OPEN SYSTEMS® Accounting Software

ODBC Kit
User's Manual

PN/2210.OD61

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Document Number 2210.OD61

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Printed in U.S.A. This manual is recyclable.

June 2000, Release 6.10

This document has been prepared to conform to the current release version of OPEN SYSTEMS Accounting Software. Because of our extensive development efforts and our desire to further improve and enhance the software, inconsistencies may exist between the software and the documentation in some instances. Call your customer support representative if you encounter an inconsistency.

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Welcome to OSAS™

The OPEN SYSTEMS Accounting Software (OSAS) product line consists of several accounting applications. Each application addresses a different phase of your financial operations; together, they form a powerful accounting solution to your daily and periodic accounting needs.

Customer Support

Open Systems has a strong commitment to customer service and product quality. If you have difficulty in using Open Systems products, consult the user's manual and other OSAS reference materials. If you need more information, consult a customer support representative.

OSAS Overview

Resource Manager

The Resource Manager application is the foundation or shell of OSAS; it provides the operating environment that holds the other applications. Resource Manager also includes three powerful business features: Global Inquiry, Executive Information Summary (*EIS*) and Print Manager. With Global Inquiry, you can drill around your accounting data to find selected information throughout your system. With EIS, you can access company information quickly and view summaries of all aspects of a company or a group of companies. With Print Manager, when you print reports to file, your reports can be stored, sorted, printed, and searched for specific text.

Base Applications

Base applications are designed and produced with the largest possible number of industries in mind. They are most effective when you interface them with each other. Base applications are usually named after common accounting operations. Examples are: General Ledger, Accounts Payable, Purchase Order, Accounts Receivable, Sales Order, Payroll, and Inventory.

OSAS Versions 6.1 and Higher

You can use OSAS versions 6.1 and higher in text (or character-based) mode on any supported operating system.

In Windows environments, you have the choice to use either the text version or the graphical version. While the interface is different in the two versions, the functions in both versions are the same in screen layout and in function. The OSAS user's manuals show screens in the graphical format. You should be able to apply the information shown in the graphical examples to the text version with ease.

For specifics on using the graphical version of OSAS, turn to page 1-11.

For specifics on using the text version, turn to page 1-33.

The ODBC Kit

Use the ODBC Kit to access your OSAS company information from any ODBC-compliant application such as Microsoft Access, Excel, Query™, or Word™; Crystal Reports, and so forth. The functions available from the OSAS menu are used to manage the data dictionaries and the ODBC driver.

Menu Structure

The ODBC Kit menu structure is similar to the structure of other OSAS applications: functions appear roughly in order of use.

CONFIG.TPM

Use the CONFIG.TPM function to set up a database configuration file for each company installed in OSAS whose data you want to access using the ODBC drivers.

Dictionary Tools

Use the functions on the Dictionary Tools menu to set up and maintain information about your data dictionary. For example, use the Update Reserved Words function to establish and update information about reserved words for the version of SQL you use.

Dictionary Reports

Use the Dictionary Reports functions to verify that field names are not SQL reserved words, to produce a list of field and file names in the data dictionary.

Application Interaction

The ODBC Kit is an application that translates your OSAS data into fields accessible through SQL (Structured Query Language). You can use SQL to access any application included in the data dictionary that you have access rights to.

Conventions

Your manual will help you to install OSAS on any standard machine within many popular operating systems and help you with your accounting software questions. In the manual, we use the term “Conventions”, or standards, to help describe complicated processes, new terms, and to help you use your OSAS applications.

Manual Conventions

The *ODBC Kit User’s Manual* is divided into the following sections:

- “Introduction” provides an overview of this application and the OSAS system, and the basic functionality of the application including graphical and text-based application features, and function key references.

- “Application functions” explains the functions within the application: where each function fits within the application, and how to use each function to get the most out of the application.

Mouse Conventions

The standard mouse has two buttons, left and right, each performing certain functions. In this manual, we use these terms for using the mouse: *click*, *right-click*, *double-click*, and *deselect*.

The *click* is a single press on the left mouse button. Place the cursor over the desired function, and press the left button to enable, or “select”, that function.

A *right-click* is a single press of the right mouse button.

To *double-click*, move the cursor over the desired function, and quickly press the left mouse button twice. If there is too long a pause between clicks, the computer may interpret your action as two separate clicks and may not perform the desired function.

To *deselect* an object, move the cursor off the icon or folder onto a blank space within the window and press the left mouse button.

Note

Some mouse manufacturers allow you to change the function of the mouse buttons for those who prefer (for example) to use the mouse with their left hand. In this case, reverse the commands when you use them. For example, a click refers to a single press of the right mouse button, while the term right-click refers to a single press of the left button, and so on.

OSAS Conventions

Operations in OSAS follow conventions, or patterns. The conventions used in OSAS applications are presented below.

Running OSAS

OSAS runs in an operating system supported by 150 megabytes of permanent storage and 4MB of RAM. You may need additional space or memory, depending on the size of your data files and the operating system you use. Consult your reseller for more information.

Starting OSAS

To start OSAS on a computer running Windows, double-click the OSAS shortcut on the desktop or in the appropriate folder.

To start OSAS on an operating system other than Windows, enter **osas** at the operating system prompt.

The **osas** command can recognize three parameters: -t, -c, and -a.

The terminal ID (-t) is the identification code assigned to the terminal you are using to work with OSAS. On multiuser systems each terminal usually has a default ID that was assigned when the terminals were added to the system. Use the -t parameter only when you want to log on with an ID other than the default ID. The terminal parameter is valid only if you are using Resource Manager for LANs.

The company ID (-c) is the identification code assigned to a company. If your system carries two or more companies and you do not enter a company ID, the menu of the company entered by the last person who used the terminal appears.

The access code (-a) is your personal password. Refer to the *Resource Manager User's Manual* for information about assigning passwords.

The most general expression for getting into OSAS takes all the parameters into account. For example, if you are on terminal 2, you want to work with company B, and the password is *selena*, specify that information to enter the system:

osas -t T2 **-c** B **-a** selena

In UNIX you can enter the parameters in any order, and you can use any combination. You must leave a space between the parameter mark (-t, -c, or -a) and the parameter itself.

In Windows you can click on the shortcut's properties and, in the Target field, enter your access code and your company ID. For example, using selena as your access code and H as your company ID, enter

C:\osas\progRM\osastm.exe -m4096 **-t**T00 **-n**T00 **- -a**selena **-c**H

In the Windows icon properties, the parameter marks (-m, -t, or -n) can be entered in any combination but must be before the separation dash. The access code and company ID commands (-a and -c) must be entered *after* the separation dash.

GUI/Text Command Conventions

When you see the phrase "use the **Proceed (OK)** command" in the user's manuals, you can press the **PgDn** key in either text or graphical mode. In graphical mode, clicking the **OK** button has the same effect as pressing the **PgDn** key.

Menu Conventions

When you start OSAS, the Main menu, which presents the applications you can use, appears. If you are using the Resource Manager for UNIX or Linux, the Text menu appears.

If you are using the Resource Manager for Windows, you can choose between the Text menu, the Graphical menu, or the Start-style menu. In Windows, use the Workstation Configuration Defaults function (see the *Resource Manager User's Manual*) to select the style of menu you want displayed by default, or you can press Shift-F5 to toggle between the menu styles from any menu. You can use any of the menus regardless of whether you use the text or graphical modes for the OSAS functions.

Favorites Menu

The Favorites menu operates in any of the menu formats. The Favorites menu allows quick and easy access to the OSAS functions you use most, allowing you to add selections for entire menus or particular functions.

With the Favorites menu, you save time in no longer switching to and from commonly accessed applications. For example, if you perform tasks in several applications, such as Transactions and Cash Receipts in Accounts Receivable, GL Account maintenance in General Ledger, and Price and Item Inquiry functions in Inventory, you can set up a Favorites menu rather than moving between each application's menus. Once you have set up your Favorites menu, you can open a function for use with one press of the **Enter** key or the click of a mouse button.

Favorites Menu: Graphical Style

For a sample of the Start-style favorites menu, see page 1-21. For a sample of the text favorites menu, see page 1-35.

OSAS Graphical

In a Windows environment, you can choose from two types of graphical-style menus. The standard Graphical menu features application selections that resemble many Windows functions. The Start-style menu is named because of its functional resemblance to the Start menu in Windows 95, 98, NT and 2000.

Both graphical menus provide pull-down menus, convenient tool buttons and easy access to your installed applications and their functions using either the mouse or keyboard. The two graphical menus provide you with a visual choice in your interaction with OSAS and your data.

When you select an application in either graphical OSAS menu, the application's main menu, presenting several related functions, is displayed beside the OSAS menu. Selecting a function leads you to either a function screen or another menu.

Several commands are available within the menu to perform various tasks such as changing the system date, entering access codes, switching between sample data and live data, and so on. You can perform these menu commands in these ways (if a button or pull-down menu selection is muted or gray, it is not available for use):

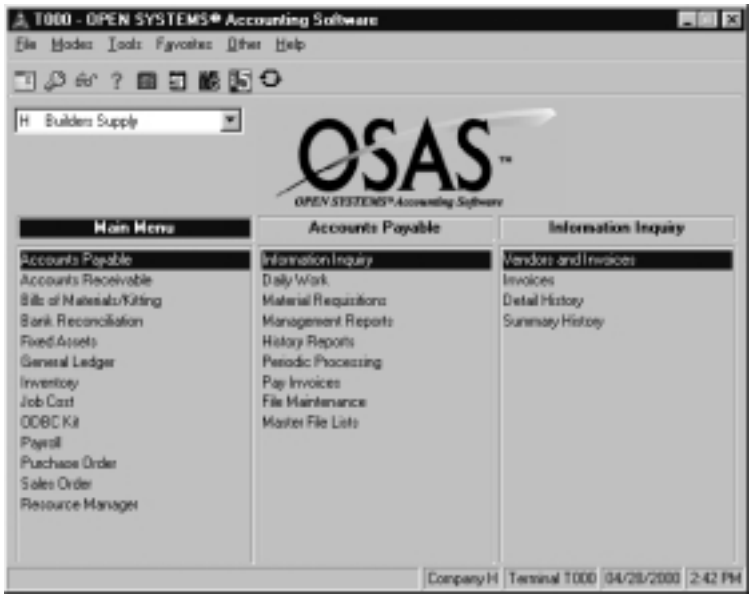
- click the appropriate graphical tool button
- select the command from a pull-down menu
- press the associated keyboard hot key

If you use the graphical menu, you can select application menus and functions by clicking the function or menu name on the menu, or by highlighting your choice and pressing **Enter**.

If you choose the Start menu you can select applications from the Main menu by using the arrow keys to highlight your choice and pressing **Enter,** by clicking the selection, or by holding the mouse cursor over the selection until the menu appears.

From any application menu, you can select a button from the previous menu to move directly to that menu. If you are several menu levels away from the Main menu, you can return to the Main menu by clicking items on the previous menus.

Graphical Main Menu



You can exit from a Graphical menu in these ways:

- select a button from a previous menu
- press the **Tab** key to go to the OSAS menu
- click the Close box in the upper right hand corner of the window to close OSAS
- use the **Exit** (**F7**) command to close OSAS
- select **Exit** from the pull-down File menu to close OSAS

Start Main Menu

You can exit from a menu in these ways:

- press the left arrow key to go to the previous menu (one menu up)
- hold the mouse over a different menu choice
- press the **Tab** key to go to the OSAS menu
- click the Close box in the upper right hand corner of the window to close OSAS
- use the **Exit** (**F7**) command to close OSAS
- select **Exit** from the pull-down File menu to close OSAS

Special Commands in Graphical Menus

In either graphical menu, you can right-click on a menu selection to display the Special Commands menu, which allows you to perform these special tasks:

From the standard menus:

- add a function or menu to the Favorites menu
- change to the Favorites menu
- change from live to sample data and vice versa
- display information about a function
- perform special application setup

From the Favorites menu:

- remove a function or menu
- change to the Main menu
- change from live to sample data and vice versa
- display information about a function
- perform special application setup

Menu Keys

Keyboards have a set of function keys (labeled with the letter *F* and a number), which can be used to perform certain functions within OSAS. In OSAS menus, these commands are assigned to the function keys.

Key (Command)	Operation
F1 (Key Help)	Displays the tool buttons and functions keys you can use.
F2 (Favorites Menu)	Displays or returns from the Favorites menu.
F4 (Access Code)	Displays the Access Code dialog box.
F5 (Live/Sample swap)	Switches between live and sample data.
F6 (Workstation Date)	Displays the current workstation date and allows you to change it.

Key (Command)	Operation
F7 (Exit)	Exits from OSAS.
F9 (Application Setup)	Performs certain application setup tasks. For example, in General Ledger, you can select the year with which you want to work. If Setup is required in an application, the application's user's manual will describe its usage.
F10 (Add/Remove Favorites)	Adds functions to and deletes functions from your Favorites menu.
Shift-F2 (Application Info)	Displays information about the applications you have installed.
Shift-F5 (Change menu style)	Switch between text and graphical menu styles without going into Defaults.
Shift-F6 (Toggle GUI screens)	Toggles between graphical screens and text-based screens for the functions you use.
Shift-F7 (Toggle GUI scaling)	Toggles screen scaling on and off. When scaling is off (the default setting), the graphical screens become smaller when you use higher monitor resolutions.

Pull-Down Menus

When using the graphical menus, you can use the pull-down menus and tool buttons (buttons with graphical icons in a row below the pull-down menus) to access functions without using the function keys. While the function keys work in the graphical menus, the menu bar and tool buttons offer you a choice in accessing these functions. Such a choice is common in graphical Windows applications.

Using the mouse, you can either move the cursor to the menu and click once, or click on a tool button for the function desired. Below is a sample of the OSAS pull-down menu and tool buttons and a description of each.

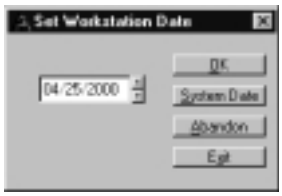
File Menu

Command	Tool Button	Key	Result
Access code		**F4**	Displays the Access Code dialog box. See Access Code dialog box below.
Sample data set or Live Data set		**F5**	Toggles between the Sample Data and the Live Data.
Workstation date		**F6**	Displays the Workstation date dialog box. See Workstation Date dialog box below.
Exit		**F7**	Exits from OSAS.

Using the Access Code dialog box

To change the access code, enter the code in the field. Then click **OK** to save your entry and return to the OSAS menu, or click **Exit** to abandon the dialog box and return to the menu.

Using the Workstation Date dialog box



To set a new workstation date, enter the date in the field, use the up/down buttons to increase/decrease the date displayed, or click **System Date** to change the date to match the operating system date. Then click **OK** to change the workstation date, **Abandon** to restore the original date displayed, or **Exit** to return to the Main menu.

Modes Menu

Command	Tool Button	Key	Result
GUI Functions		**Shift-F6**	Toggles between GUI function screens and text function screens.
Scale GUI Screens		**Shift-F7**	Toggles scaling of GUI screens on and off. When scaling is off (the default mode), the screen size is smaller when you use higher monitor resolutions.

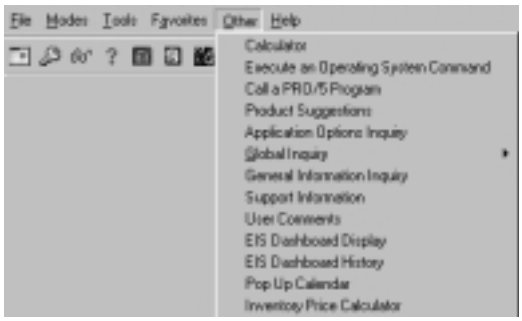
Tools Menu

Command	Tool Button	Key	Result
Calculator			Displays the Windows calculator.

Favorites Menu

Command	Tool Button	Key	Result
Change to Favorites		**F2**	Displays the Favorites menu/Main menu. See *Graphical Favorites Menu* on page 1-21.

Other Menu



The Other menu contains a set of utilities. A calculator and Global Inquiry (which presents data from several applications) are two of the utilities on the Other menu. See the *Resource Manager User's Manual* for information about all of the utilities on the Other menu.

Help Menu

Command	Tool Button	Key	Result
Help		**F1**	Displays descriptions of the application menus and functions.
About OSAS			Displays the About OSAS dialog box.

Tool Bar Icons

There are three icons on the tool bar that were not described above.

Tool Button	Key	Result
	Shift-F2	Displays the Application Information dialog box.
		Displays the pop-up calendar screen. You can use the calendar to add and review reminders for any date.
		Opens an MS-DOS prompt.
		Displays a screen for calling any BBx program that does not require variables to be passed to it. See Appendix F the *Resource Manager User's Manual*.

Other Graphical Menu Features

The graphical menus offer more than shortcuts to menu commands. You can also switch between live and sample data, or change to another company and its data set.

Change Company Field

Select the company to change to from the pull-down list box.

Data Set

On the Start menu, you can check the **Live Data** radio button to work with live data, or check the **Sample Data** radio button to work with sample data. You can also press **F5** to change between sample and live data.

Right-Click Menu

Screen (Key)	Description
Add to/Remove Favorites (**F10**)	Use the Add to/Remove Favorites menu button to add the desired submenu or function to or from your Favorites menu.
Change to Favorites/Main (**F2**)	Toggles your display menu between your Favorites menu and your Main menu.
Sample data/Live data (**F5**)	Switches between your sample data and your live data.
Setup (**F9**)	Performs certain application setup tasks. For example, in General Ledger, you can select the year with which you want to work. If Setup is required in an application, the application's user's manual will describe its usage.
Function Information (**F1**)	Displays information about the selected function.

Graphical Favorites Menu

Your Favorites menu saves time in moving between applications, opening and closing submenus and application menus, and allows easy access to your common applications. By setting up your Favorites menu, you can access your most-used functions or submenus by pressing the **F2** key (or by selecting Favorites from the pull-down menu).

Favorites Menu: Start Style

To add a function to the Favorites menu from the main OSAS menus, simply highlight the function you want to add on the menu and press the **F10** function key to add it to Favorites.

To remove a function from the Favorites menu, highlight the function on the Favorites menu and press the **F10** function key to remove it from the menu.

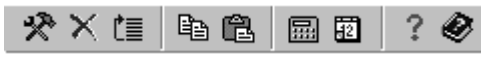
You can also use the right-click menu to add a function to Favorites or to remove a function from Favorites.

Graphical Function Commands

Once you select an OSAS application function from the menu, the function screen appears. The way that you enter data on OSAS screens is consistent from function to function. To move around the OSAS screens you use the function commands described below.

In OSAS, commands are assigned to various keys on your keyboard, as well as to certain tool buttons and pull-down menu selections. You can use these commands to work with data entry screens. If a tool button or menu selection appears grayed-out or muted, the command is unavailable at this time.

Function Tool Bar Buttons



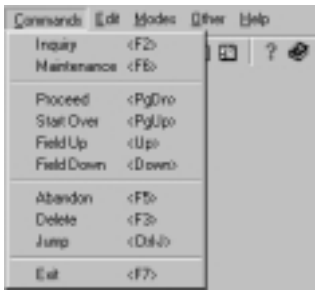
Tool Button	Key	Result
	F6	Go directly to the appropriate File Maintenance function to update information about the field you are in.
	F3	Delete the information on the screen. Since this command can delete an entire record, use it with caution.
	PgUp	Move the cursor back to the first field on the screen or to the first field after the key field without erasing the entries or changes you made.
	Shift-F9	Copy the contents of the current field.
	Shift-F10	Paste the contents you copied from a previous field into the current field.
		Displays the calculator screen.
		Displays the pop-up calendar screen. You can use the calendar to add and review reminders for any date.
	F1	Displays information about the field you are in.
		Displays the on-line documentation.

Verification Buttons

Click on the **OK** button to proceed to the next screen or to save your entries, click on the **Abandon** button to abandon your entries.

Function Pull-Down Menus

Commands Menu

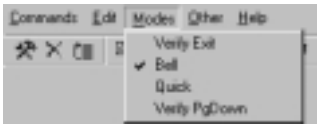


Selection (Key)	Operations
Inquiry (**F2**)	Use the **Inquiry** command to display a list of valid entries for the current field, from which you can select a choice.
Maintenance (**F6**)	Go directly to the appropriate File Maintenance function to update information about the field you are in.
Proceed/OK (**PgDn**)	Proceed to the next screen or save your entries.
Start Over (**PgUp**)	Move back to the first field on the screen or to the first field after the key field without erasing the entries or changes you made.
Field Up (**Up**)	Move the cursor to the previous field.
Field Down (**Down**)	Move the cursor to the next field.
Abandon (**F5**)	Move the cursor back to the first field on the screen. Any entries or changes you made are erased.
Delete (**F3**)	Delete the information on the screen. Since this command can delete an entire record, use it with caution.
Jump (**Ctrl-J**)	Move the cursor to the next block of data on the screen or to the next field that requires an entry.
Exit (**F7**)	Exit from a screen or a window and disregard everything you entered.

Edit Menu

Selection (Key)	Operations
Copy (**Shift-F9**)	Copy the contents of the current field.
Paste (**Shift-F10**)	Paste the value you copied from a previous field into the current field.
Undo (**Ctrl-Z**)	Restore the contents of the current field from before you made changes to it.

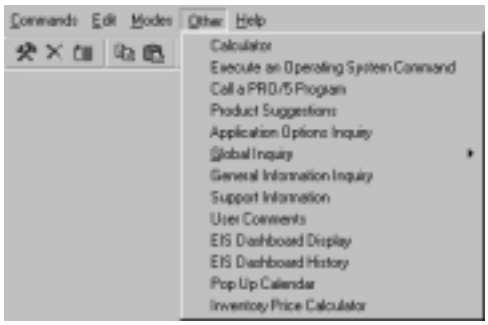
Modes Menu



Check the options you want to use.

Selection (Key)	Operations
Verify Exit	If verification is turned on, you must press a key twice to verify that you want to perform exit or abandon operations.
Bell	If the bell is turned on, it sounds at an error or when you must verify a command.
Quick	If this option is turned off, the cursor stops at every field possible. To make the cursor skip the fields that do not require an entry in certain application functions, turn the option on.
Verify PgDown	If verification is turned on, you must press the **PgDn** key twice to proceed to the next screen or to save your entries.

Other Menu

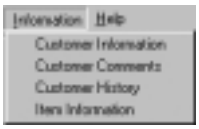


Selection	Operations
Calculator	Displays the OSAS calculator.
Execute and OS Command	Allows you to enter an operating system command from within OSAS.
Call a PRO/5 Program	Allows you to execute a PRO/5 program.
Product Suggestion	Use this function to create a printable report for future OSAS product suggestions.
Application Options Inquiry	Allows you to view the application options you have set up for a particular application.
Global Inquiry	Use this function to search across your data. You can select from the installed applications which data to search in.
General Information Inquiry	Allows you to search for information on employees, customers, and vendors.
Support Information	Displays the OSAS Support Information.
User Comments	Allows the user to leave messages within the system.
EIS Dashboard Display	Displays the EIS Dashboard.
EIS Dashboard History	Displays the EIS Dashboard history.
Pop-Up Calendar	A reminders feature that allows you to create and read dated reminders within OSAS.

Help Menu

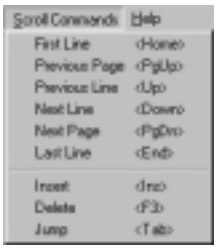
Selection (Key)	Operations
About OSAS	Displays the information about your OSAS installation.
Command Help	Displays the OSAS Key Help screen.
Help (**F1**)	Get information about the field you are working on.
Online Doc (**Shift-F1**)	Opens your.PDF file viewer to display the documentation for your particular application.

Information Menu



The Information menu appears on some function screens in certain applications. The functions on the menu are determined by the applications installed.

Scroll Commands Menu



The Scroll commands menu appears only on screens with scroll regions displaying multiple lines of information.

Selection (Key)	Operations
First Line (**Home)**	Moves the cursor to the first data entry field.
Previous Page (**PgUp**)	Displays the previous page.
Previous Line (**Up**)	Moves the cursor up to the previous line.
Next Line (**Down**)	Moves the cursor down to the following line.
Next Page (**PgDn**)	Displays the following page.
Last Line (**End**)	Moves the cursor to the last data entry field.
Insert (**Ins**)	Allows the insertion of characters between preexisting entries in a field.
Delete (**F3**)	Deletes the selected characters.
Jump (**Tab**)	Moves the cursor to the next section of the screen in some functions.

Inventory Lookup Menu

If you use the Inventory application and the cursor is in an Item ID field, you can use any of the **Inventory Lookup** commands to search for information about items and select an item for entry in the field you are in.

Selection (Key)	Operation
Alias Lookup (**Shift-F3**)	Search for items with a specified alias listed as an alternate item. When you enter the alias, you can use the "*****" and "**?**" wildcard characters to restrict or widen the search.
Customer/Vendor Lookup (**Shift-F4**)	Search for an item based on customer ID or vendor ID. When you enter the customer or vendor ID, you can use the "*****" and "**?**" wildcard characters to restrict or widen the search.
Detail Lookup (**Shift-F5**)	Search for detailed information about an item. You can enter search information in any of the fields that appear, using any of the following wildcard characters to restrict or widen the search: *** ? < > =**.
Lot Lookup (**Shift-F6**)	Search for an item based on lot number. When you enter the lot number, you can use the "*****" and "**?**" wildcard characters to restrict or widen the search.
Serial Lookup (**Shift-F7**)	Search for an item based on serial number. When you enter the serial number, you can use the "*****" and "**?**" wildcard characters to restrict or widen the search.
Description Lookup (**Shift-F8**)	Search for an item based on item description. When you enter the description, you can use the "*****" and "**?**" wildcard characters to restrict or widen the search.

Other Graphical Function Controls

Function Field Inquiry

When the Inquiry button appears next to a field, you can either click on the button or press the **F2** (Inquiry) key.

Graphical Scroll Region Buttons

Use these command in scroll region areas to move between the lines in the region:

Scroll Button	Key	Result
	Home	Moves the cursor to the first line in a scroll region
	PgUp	Moves the cursor to the previous page of lines in a scroll region
	Up	Moves the cursor up one line
	Down	Moves the cursor down one line
	PgDn	Displays the next page of lines in the scroll region
	End	Moves the cursor to the last line in the scroll region

Help Commands

When you use the **Help** (**F1**) command, you can use these commands:

Key	Operation
F6 (Maintenance)	Edit a help screen.
F7 (Exit)	Exit from the help screen and close the window.

In-Field Editing Commands

When the cursor is in a field that contains information, you can use these keys and commands:

Key	Operation
Right	Move the cursor to the right.
Left	Move the cursor to the left.
Del (Delete)	Delete the character the cursor is on.
Ins (Insert on/off)	Switch insert mode on and off. When the **INS** flag appears at the bottom right corner of the screen on the status bar, characters you type push characters after the cursor off to the side. When insert mode is turned off (**OVR** appears on the status bar), characters you type write over existing ones.
Home	Move the cursor directly to the beginning of the field.
End	Move the cursor directly to the end of the field.
Ctrl-Z (Undo)	Restore a field to the way it was before you changed it. You can use this command only while you are in the field; once you move past it, you must use the **Abandon** (**F5**) command to clear the field.
Shift-F9 (Copy field contents)	Copy the contents of the current field.
Shift-F10 (Paste field contents)	Paste the value you copied from a previous field into the current field.

Inquiry Commands

When you use the **Inquiry** command, several other commands become available for you to use in the inquiry window.

The Inquiry windows operate in two modes: Search and Sort. You can toggle between these modes within an Inquiry window by pressing the **Ins** (Insert) key. You can also choose the default mode for the inquiry windows by using the Defaults function on the Resource Manager Workstation Configuration menu.

- In Search mode, you can move through the keys listed by typing progressively larger portions of the key you want to find. For example, when you type **C,** the window displays keys beginning with the letter C. When you next press **A**, the window displays keys beginning with CA, and so on.

- In Sort mode, you can change the order of certain inquiry windows by pressing the letter key associated with the window sort. You can see the available sorts in any inquiry window by selecting **Command Help** from the Help pull-down menu in the inquiry window.

Note

You can also shorten your data search by entering a part of the key before you use the **Inquiry** command. For example, if you know that the ID starts with *JAR*, enter **JAR** in the ID field before you use the **Inquiry** command. The inquiry list will start with *JAR* and run through the end of the list.

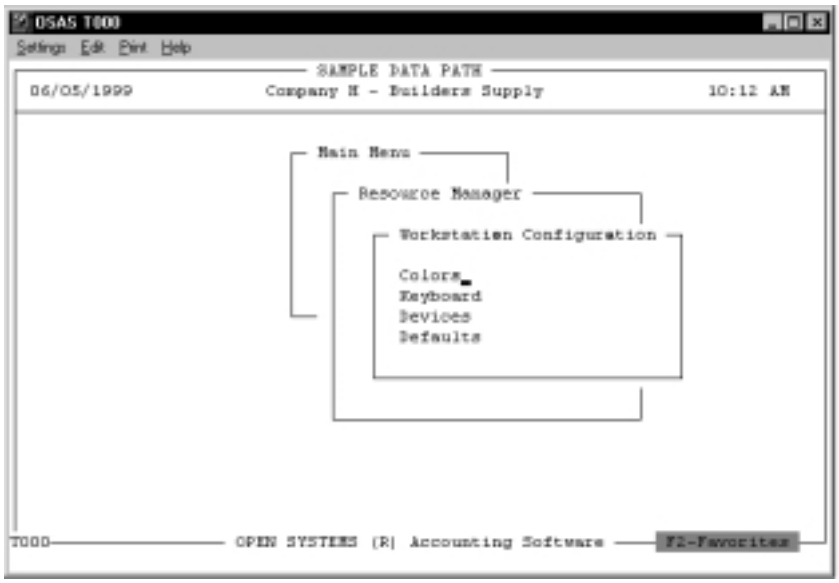
Scroll Button	Key	Result
	Home	Moves the cursor to the first key in the inquiry window.
	PgUp	Displays the previous page of keys in the inquiry window.

Scroll Button	Key	Result
	Up	Moves the cursor up one line.
	Down	Moves the cursor down one line.
	PgDn	Displays the next page of keys in the inquiry window.
	End	Moves the cursor to the last key in the inquiry window.
	Ins	Toggle between Search mode and Sort mode.
	F7 (Exit)	Close the inquiry window without selecting anything.
	Enter	Select the item to which the cursor is pointing.

OSAS Text

The Text menu can be used on all OSAS compatible systems. Using text-based menus, the Text menu (shown below) offers easy access to your applications.

Text Main Menu



When you select an application, the application's menu, which presents several related functions, is superimposed over the Main menu. Selecting a function leads you to a function screen or to another menu.

You can select applications from the Main menu in these ways:

- Use the arrow keys to move the cursor up or down, highlighting the application you want to use. Then press **PgDn** or **Enter** to select it.

- Press the first letter of the application you want to use. The cursor jumps to the first application beginning with the letter, press the letter key or the down arrow until the application you want is highlighted. When your choice is highlighted, press **PgDn** or **Enter** to select it.

- Position the mouse cursor over the application and click. The application will briefly highlight and switch to the application screen.

- To jump to the first application on the menu, press **Home**. To jump to the last application on the menu, press **End**.

To select a function from an application menu, highlight and select your choices the same way you do on the Main menu—with one exception: you can press **PgDn** only when an option leads to another menu, and you must press **Enter** to select a function.

On an application menu you can press **PgUp** to move to the menu immediately above it. If you are several menu levels away from the Main menu, you can return to the Main menu by pressing **PgUp** repeatedly or by pressing the **Tab** key.

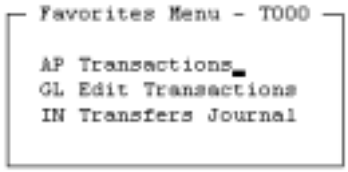
You can exit from a menu in these ways:

- Press the **PgUp** key to go to the previous menu (one menu up)
- Press the **Tab** key to go to the Main menu
- Use the **Exit** (**F7**) command to go to the operating system

Text Favorites Menu

Your Favorites menu saves time in moving between applications, opening and closing submenus and application menus, and allows easy access to your common applications. By setting up your Favorites menu, you can access your most-used functions or submenus by pressing the **F2** key.

Favorites Menu: Text Style



To set up the text-style display follow these steps:

1. Move your cursor to the submenu or application that you want placed in the Favorites menu.

2. Press **F10**.

You can press **F2** to verify your selection was added to your Favorites menu.

To remove an application:

1. Press **F2** to display the Favorites menu.

2. Move your cursor to the submenu or application you want removed.

3. Press **F10**.

Function Keys Used in the Text Menu

Most keyboards have a set of function keys (usually labeled with the letter *F* and a number). Within the menu, commands are assigned to these function keys. You can use the commands to work with data entry screens.

Except for the **Command Help** (**Esc**), the **Jump** (**Tab**) commands, and the **Enter** key, you can use the Keyboard function in Resource Manager to reassign any function key to any command.

Key	Operation
Esc (Command help)	Views the list of commands for the menu. (To close the commands window, press any key.)
F1 (Function Help)	Displays help information for this function.
F2 (Favorites Menu)	Displays the Favorites menu or changes to the regular menu from the Favorites menu.
F3 (Change Company)	Allows you to switch between companies.
F4 (Access Code)	Displays the Access Code prompt.
F4 (twice) (Other Menu)	Opens a menu of utilities. A calculator and Global Inquiry (which consolidates and presents information from other applications) are some of the utilities on the Other Commands menu. See the *Resource Manager User's Manual* for information about the utilities on the Other Commands menu.
F5 (Live/Sample swap)	Switches between live and sample data.
F6 (Workstation Date)	Displays the current workstation date and allows you to change it.
F7 (Exit)	Exits from OSAS.
F9 (Application Setup)	Performs certain application setup tasks. For example, in General Ledger, you can select the year with which you want to work. If Setup is required in an application, the application's user's manual will describe its usage.

Key	Operation
F10 (Add to Favorites)	Allows you to add to and delete from your Favorites menu.
Shift-F2 (Application Info)	Displays information about the applications you have installed.
Shift-F5 (Change menu style)	Switch between text and graphical menu styles without going into Defaults.
Shift-F6 (Toggle GUI screens)	If you are using the graphical version of OSAS, this command toggles between graphical screens and text-based screens for the functions you use.
Shift-F7 (Toggle GUI scaling)	If you are using the graphical function screens, this command toggles screen scaling on and off. When scaling is off (the default setting), the graphical screens become smaller when you use higher monitor resolutions.
PgUp (Start over)	Move back one menu level.
Tab (Jump)	Move back to the Main menu.
Enter	Select a menu or function from a menu.
Up or **Down**	Move the cursor up or down through the menu selections.
Ctrl-G (Bell on/off)	If the bell is turned on, it sounds at an error or when you must verify a command. To turn off the bell, use this command or the Defaults function in Resource Manager. To turn the bell back on, use this command again.

Text Function Commands

Once you select an OSAS application function from the menu, the function screen appears. The way that you enter data on OSAS screens is consistent from function to function. To move around the OSAS screens you use the function commands described below.

Most keyboards have a set of function keys (usually labeled with the letter *F* and a number). In OSAS, commands are assigned to these function keys. You can use the commands to work with data entry screens.

Except for the **Command Help** (**Esc**) and **Jump** (**Tab**) commands and the **Enter** key, you can use the Keyboard function in Resource Manager to reassign any function key to any command.

Key	Operation
Esc (Command help)	View the list of commands for the screen you are on and the field you are in. (To close the window, press any key.)
F1 (Help)	Get information about the field you are working on.
F2 (Inquiry)	Make a selection from a range of entries for a field if the Inquiry flag appears at the bottom of the screen.
F3 Delete)	Delete the information on the screen. Since this command can delete an entire record, use it with caution.
F4 (Other)	Open a menu of utilities. A calculator and Global Inquiry (which consolidates and presents information from other applications) are some of the utilities on the Other Commands menu. See the *Resource Manager User's Manual* for information about the utilities on the Other Commands menu.
F5 (Abandon)	Move the cursor back to the first field on the screen or to the first field after the key field. The entries and changes you made are erased.
F6 (Maintenance)	Go directly to the appropriate File Maintenance function to update information about the field you are in if the Maint flag appears at the bottom of the screen.
F7 (Exit)	Exit from a screen or a window and disregard everything you entered.
F8 (List)	Send the contents of the screen to a printer or a text file.
Shift-F1 (Online Doc)	Opens your.PDF file viewer to display the documentation for your particular application.
Shift-F2 (Information)	Open an Information menu. Each selection on the menu is an information window that you can access if the Info flag appears at the bottom of the screen. Each window contains a category of information about the field you are in.

Key	Operation
PgUp (Start over)	Move the cursor back to the first field on the screen or to the first field after the key field without erasing entries you made.
PgDn (Proceed)	Approve the data on the screen, change the file accordingly, and proceed to the next spot (field or screen).
Tab (Jump)	Move the cursor to the next block of data on the screen or to the next field that requires an entry.
Enter or **Down**	Move the cursor to the next field and accept the data entered.D
Up	Move the cursor up (or back) one field. If you changed the information in the field you were in before you used this command, the change is lost when you move the cursor up.
Ctrl-V (Verification on/off)	If verification is turned on, you must press a key twice to verify that you want to perform that operation.
Ctrl-G (Bell on/off)	If the bell is turned on, it sounds at an error or when you must verify a command. To turn off the bell, use this command or the Defaults function in Resource Manager. To turn the bell back on, use this command again.
Ctrl-F (Quick on/off)	If this option is turned off, the cursor stops at every field possible. To make the cursor skip the fields that do not require an entry, use this command to turn the option on.
Ctrl-O (Show function keys)	If this option is turned on, the applicable function keys are displayed on the screen.

Help Commands

When you use the **Help** (**F1**) command, three commands become available for you to use on help screens.

Key	Operation
F3 (Delete)	Delete the help screen contents. To recover a deleted screen, copy the xxHELP file from the distribution media to the /PROGxx subdirectory (*xx* is the application ID). The copying process overwrites changes you made to other help screens.
F6 (Maintenance)	Edit a help screen.
F7 (Exit)	Exit from the help screen and close the window.

In-Field Editing Commands

When the cursor is in a field that contains information, you can use the following keys and commands:

Key	Operation
Right	Move the cursor to the right.
Left	Move the cursor to the left.
Del (Delete)	Delete the character the cursor is on.
Ins (Insert on/off)	Switch insert mode on and off. When the Insert flag appears at the bottom of the screen, characters you type push characters after the cursor off to the side. When insert mode is turned off, characters you type write over existing ones.
Home	Move the cursor directly to the beginning of the field.
End	Move the cursor directly to the end of the field.
F9 (Undo)	Restore a field to the way it was before you changed it. You can use this command only while you are in the field; once you move past it, you must use the **Abandon** (**F5**) command.

Key	Operation
F10 (Delete to end of line)	Delete the characters in the field to the right of the cursor. If insert mode is turned off and you enter a character in the field's first position, everything in the field is deleted.
Shift-F9 (Copy field contents)	Copy the contents of the current field.
Shift-F10 (Paste field contents)	Paste the value you copied from a previous field into the current field.

Inquiry Commands

When you use the **Inquiry** command, several other commands become available for you to use in the inquiry window. The Inquiry windows operate in two modes: Search and Sort. You can toggle between these modes within an Inquiry window by pressing the **Ins** (Insert) key. You can also choose the default mode for the inquiry windows by using the Defaults function in the Resource Manager.

- In Search mode, you can move through the keys listed by typing progressively larger portions of the key you want to find. For example, when you type **C,** the window displays keys beginning with the letter C. When you next press **A**, the window displays keys beginning with CA, and so on.

- In Sort mode, you can change the order of certain inquiry windows by pressing the letter key associated with the window sort. You can see the available sorts in any inquiry window by pressing **Esc** (**Command Help**).

Note

To shorten your data search, use a partial-key inquiry to cut down the size of the inquiry list. For example, if you know that the ID starts with *JAR*, enter **JAR** in the ID field before you use the **Inquiry** command. The inquiry list will start with *JAR* and run through the end of the list.

Key	Operation
PgUp	Display the previous page of the window.
PgDn	Display the next page of the window.
End	Move directly to the last item on file.
Home	Move directly to the first item on file.
Down	Move down one item.
Up	Move up one item.
Ins (Look up)	Toggle between Search mode and Sort mode.
F7 (Exit)	Leave the Inquiry window without selecting anything.
Enter	Select the item the cursor is pointing to.
Esc (View commands)	Open a window that shows Inquiry window commands and the window ID.

Inventory Lookup

If you use the Inventory application and the cursor is in an Item ID field, you can use any of the **Inventory Lookup** commands to search for information about items and select an item for entry in the field you are in.

Key	Operation
Shift-F3 (Alias Lookup)	Search for items with a specified alias listed as an alternate item. When you enter the alias, you can use the "*****" and "**?**" wildcard characters to restrict or widen the search.
Shift-F4 (Customer/Vendor Lookup)	Search for an item based on customer ID or vendor ID. When you enter the ID, you can use the "*****" and "**?**" wildcard characters to restrict or widen the search.

Key	Operation
Shift-F5 (Detail Lookup)	Search for detailed information about an item. You can enterformation in any of the fields that appear, using these wildcards to restrict or widen the search: *** ?** < > =.
Shift-F6 (Lot Lookup)	Search for an item based on lot number. When you enter the lot number, you can use the "*****" and "**?**" wildcard characters to restrict or widen the search.
Shift-F7 (Serial Lookup)	Search for an item based on serial number. When you enter the serial number, you can use the "*****" and "**?**" wildcard characters to restrict or widen the search.
Shift-F8 (Description Lookup)	Search for an item based on item description. When you enter the description, you can use the "*****" and "**?**" wildcard characters to restrict or widen the search.

Report Commands

You can use the following commands when a report is displayed on the screen:

Key	Operation
PgUp	Move to the previous page of the report.
PgDn	Move to the next page of the report.
Home	Move directly to the top of a group of pages.
End	Move directly to the bottom of a group of pages.
F7 (Exit)	Exit to the menu from any point in the report.
Left	Move left one character.
Right	Move right one character.
Tab (Toggle)	Toggle between the left and right halves of a report.
Up/Down	Move a line up and down the screen to line up information when you toggle between halves of a report.

Scroll Region Commands

When the prompt (>) is in a line-item scroll region, you can use the following commands:

Key	Operation
Down (Next Line)	Move down one line item.
Up (Previous Line)	Move up one line item.
PgUp (Previous Page)	Move to the previous screen or to the first line if you are on the first screen.
PgDn (Next Page)	Move to the next screen or to the last line if you are on the last screen.
Home (First Line)	Move to the first line item in the entire list.
End (Last Line)	Move to the last line item in the entire list.
F3 (Delete)	Delete the line item at the prompt (>).
Ins (Insert)	Insert a line item at the prompt (>).
Enter (Edit)	Edit the line item at the prompt (>).

Reports

Selecting a Range of Information

To produce a report, you must specify the amount of information you want in the report.

- To produce a report that includes all the available information, leave the From-Thru fields on the report function screen blank. For example, if you want information about all the vendors to be in a report, leave the Vendor ID From and Thru fields blank.

- To limit the amount of information in the report, enter the range of information in the From-Thru fields. For example, if you want a report to include information only about vendor ACE001, enter ACE001 at both From and Thru. If you want the report to include information only about vendors that start with CO, enter CO at From and COZZZZ at Thru.

Each field where you enter information on a report function screen usually restricts the overall output of the report. For example, if you leave the Vendor ID From and Thru fields blank, the report will contain information about all the vendors. But if you enter invoice 100 in the Invoice Number From and Thru fields, and invoice 100 is assigned only to vendor ACE001, the report includes information only about vendor ACE001.

Sorting

Information for reports is sorted first by a space (_), then by characters, then by digits, then by uppercase letters, and finally by lowercase letters. No matter what you enter in the From and Thru fields, however, your entries are sorted in alphabetical order (unless the function provides an option to sort the information differently).

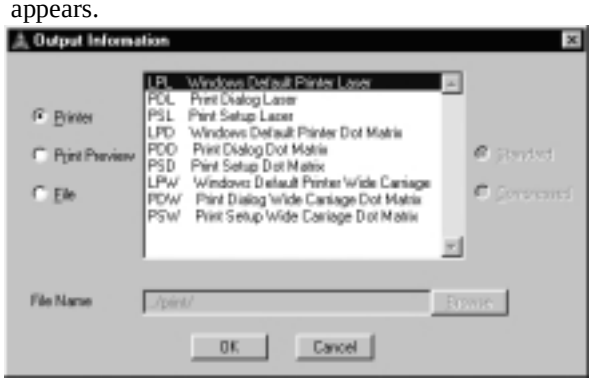
Sorting by alphabetical codes or IDs is easy. For example, the ID *ACL* comes before the ID *BB* because A comes before B.

But take notice when you enter codes or IDs that consist of something other than letters; the order might not be what you expect. For example, if 20 items are labeled 1 through 20 and you want all of them to be in a report, you might enter 1 at From and 20 at Thru, expecting them to be listed 1, 2, 3. . . 19, 20. However, since OSAS sorts in alphabetical order, they are listed in a different order: 1, 10–19, 2, 20, 3–9.

To prevent that situation, pad extra spaces in codes and IDs with zeros so that numbers in alphabetical order are also in numerical order. In the example above the items would be labeled 00000000000000000001 through 00000000000000000020.

Output the Report

When you use the **Proceed** (**OK**) command, the Output Information screen appears.



To print the report

- Select **P**rinter and choose the printer. On some reports, you can also choose whether to print the report in standard-size print or in compressed print.

- Click **OK** (or press **Enter** in text mode) to continue.

To view the report in Print Preview mode

- Select P**r**int Preview and choose the printer. On some reports, you can also choose whether to print the report in standard-size print or in compressed print.

- Click **OK** (or press **Enter** in text mode) to continue.

To save the report as a File

If you want to save the report as a data file—for example, to include it in a word-processed report (in CR-LF format)—select File. The data path for the workstation, including the default drive, appears if it is specified in the Defaults function. Enter the filename and file extension, using no more than 35 characters overall.

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Installing BASIS™ ODBC Drivers

Follow these steps to install and set up the ODBC Kit on your computer:

1. Use Resource Manager to install the OSAS ODBC Kit on your computer. See the *Resource Managers Installation Manual* for installation instructions.

2. Use the Edit CONFIG.TPM function to set up a configuration file pointing to a company.

3. Install the BASIS ODBC drivers. The BASIS ODBC driver is a 32-bit driver for Windows 95/98, Windows NT, and Windows 2000. Installing the drivers is a two-step process. You must first install the drivers on the computer, and then run a separate installation program to install the drivers into the operating system.

Note

If you have not installed the Windows ODBC Administrator, you may need to have the Windows installation disks or CDROM available. Windows prompts you for the required media if it is necessary.

Note

If you have single-user ODBC serial and authorization numbers, use the instructions below to install and register the ODBC drivers.

If you have a multiuser key, you must use the BASIS License Manager, and you will need to register and install the license through the License Manager. Follow the instructions in the Reregistering/Reinstalling a BASIS License section in chapter 2 of the *Resource Manager Installation Manual* to install the License. Then continue with the instructions below.

Installation For Windows 95/98/NT/2000

1. Start Microsoft Windows.
2. Insert the CD into your CD-ROM drive. The OSAS CD-ROM installation screen should appear automatically. If it does, start with step 6 to install ODBC. If the installation screen does not appear, start with step 3.
3. Click **Start** and select **Run**.
4. Type the letter of the CD-ROM drive, a colon, and a backslash. Then type **autorun** to start the setup program. For example,

   d:\autorun
5. Click **OK**.

Main Installation Screen

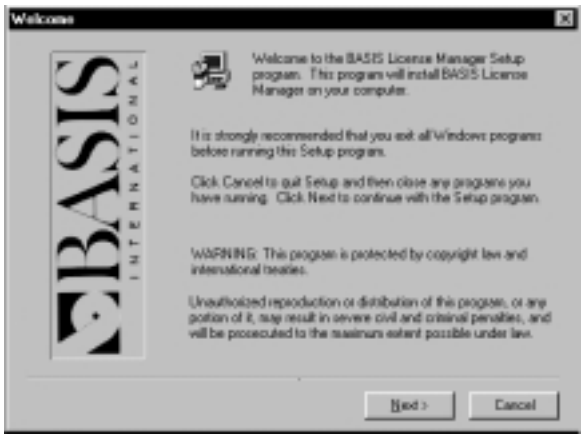
The Main Installation screen appears:

6. Click "**Install Basis Products**". The Install Basis Products screen appears.

7. Click "**BASIS ODBC Driver**".

8. The Choose Setup Language box appears. Scroll down to highlight the appropriate selection and click **OK**.

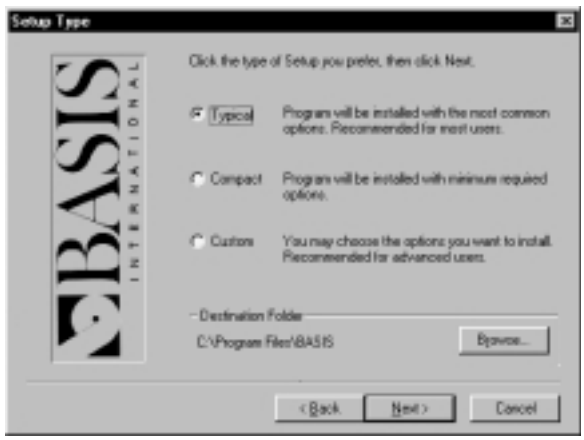
9. The BASIS Welcome screen appears next. Read the text carefully and click **Next** to continue.


Welcome
BASIS INTERNATIONAL
Welcome to the BASIS License Manager Setup program. This program will install BASIS License Manager on your computer.
It is strongly recommended that you exit all Windows programs before running this Setup program.
Click Cancel to quit Setup and then close any programs you have running. Click Next to continue with the Setup program.
WARNING: This program is protected by copyright law and international treaties.
Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.
Next >
Cancel

10. The Software License Agreement screen appears. After you read the Software License Agreement screen text, click on **Yes** to accept the agreement.

Software License Agreement
Please read the following License Agreement. Press the PAGE DOWN key to see the rest of the agreement.
PLEASE READ THIS LICENSE CAREFULLY BEFORE INSTALLING THE SOFTWARE. BY INSTALLING THE SOFTWARE, YOU ARE AGREEING TO BE BOUND BY THE TERMS OF THIS LICENSE. IF YOU DO NOT AGREE TO THE TERMS OF THIS LICENSE, YOU ARE NOT AUTHORIZED TO INSTALL THE SOFTWARE.
SOFTWARE LICENSE AGREEMENT
BASIS INTERNATIONAL LTD.
REDISTRIBUTION NOT PERMITTED
BASIS INTERNATIONAL LTD. ("LICENSOR") IS WILLING TO LICENSE THE SOFTWARE TO YOU ("LICENSEE") ONLY IF YOU ACCEPT ALL TERMS IN THIS LICENSE AGREEMENT.
This is a limited use software license agreement ("Agreement") from BASIS International
Do you accept all the terms of the preceding License Agreement? If you choose No, Setup will close. To install BASIS License Manager, you must accept this agreement.
< Back
Yes
No

11. On the Setup Type screen, you have three choices on how to install your ODBC software. For new installation, Typical is recommended.

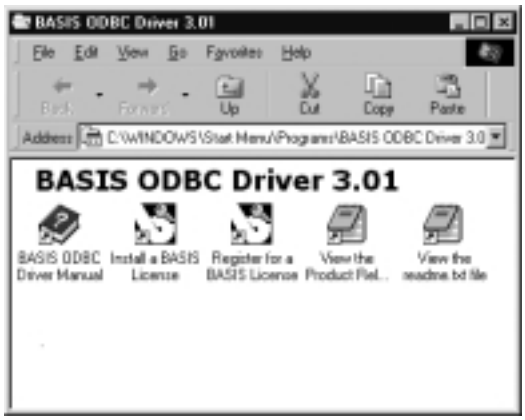

Setup Type
BASIS INTERNATIONAL
Click the type of Setup you prefer, then click Next.
Typical
Program will be installed with the most common options. Recommended for most users.
Compact
Program will be installed with minimum required options.
Custom
You may choose the options you want to install. Recommended for advanced users.
Destination Folder
C:\Program Files\BASIS
Browse...
< Back
Next >
Cancel

The destination folder automatically defaults to your C: drive. If you want to install ODBC on another local drive select **Browse** and type in the drive letter where prompted.

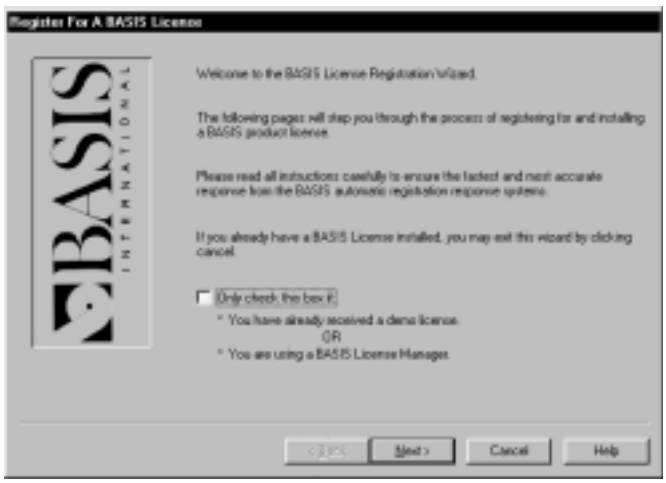
Typical Setup

12. The Select Program Folder screen adds a folder on the drive you selected and adds a shortcut for your ODBC driver. Select **Next**.

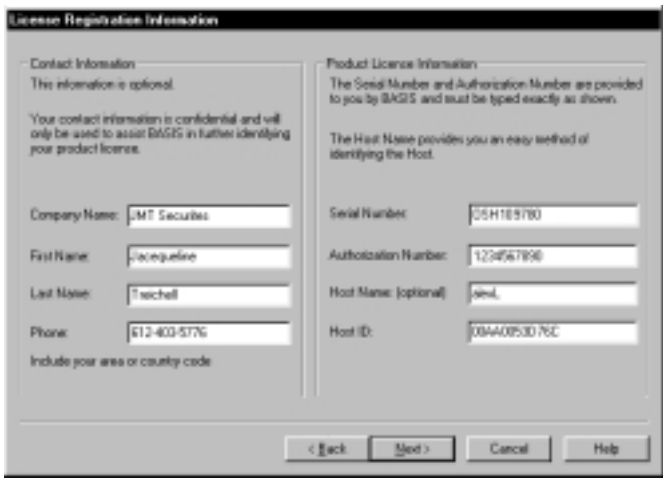
When you click Next, the BASIS ODBC Driver 3.01 folder is created and the file copy begins.


BASIS ODBC Driver 3.01
File Edit View Go Favorites Help
Back Forward Up Cut Copy Paste
Address C:\WINDOWS\Start Menu\Programs\BASIS ODBC Driver 3.0
BASIS ODBC Driver 3.01
BASIS ODBC Driver Manual
Install a BASIS License
Register for a BASIS License
View the Product Rel...
View the readme.txt file

13. You must now register for a BASIS license. If you have not installed a license, click **Next** and proceed to step 14. If you have already received your license file, or if you are using the BASIS License Manager, check the box, click **Next**, and continue from step 18 on page 2-13.

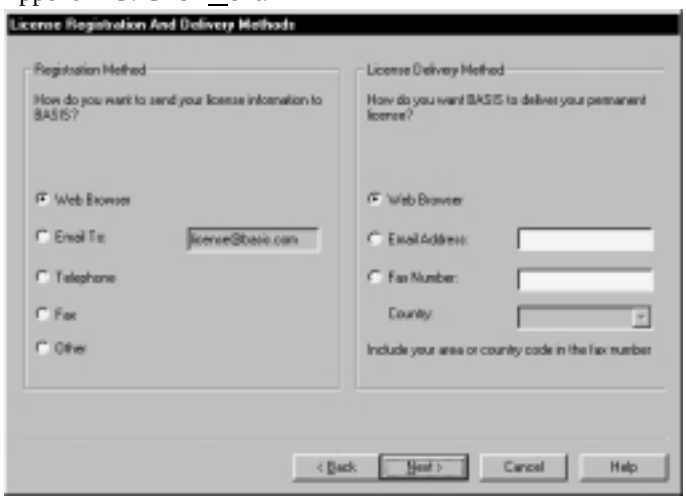

Register For A BASIS License
BASIS INTERNATIONAL
Welcome to the BASIS License Registration Wizard.
The following pages will step you through the process of registering for and installing a BASIS product license.
Please read all instructions carefully to ensure the fastest and most accurate response from the BASIS automatic registration response systems.
If you already have a BASIS License installed, you may exit this wizard by clicking cancel.
Only check this box if:
* You have already received a demo license.
OR
* You are using a BASIS License Manager.
< Back
Next >
Cancel
Help

14. In the License Registration Information screen fields, enter the information requested. The Serial Number and Authorization Number can be found on the BASIS License Registration Form that was included with the media. Click **Next** when finished.


License Registration Information
Contact Information
This information is optional.
Your contact information is confidential and will only be used to assist BASIS in further identifying your product license.
Company Name:
UMT Securities
First Name:
Jacequeline
Last Name:
Teichell
Phone:
612-403-5776
Include your area or country code
Product License Information
The Serial Number and Authorization Number are provided to you by BASIS and must be typed exactly as shown.
The Host Name provides you an easy method of identifying the Host.
Serial Number:
Authorization Number:
Host Name: (optional)
Host ID:
< Back
Next >
Cancel
Help

Web Browser

15. If the computer is connected to the Internet, use the default "Web Browser." If you choose any other registration method, follow the appropriate steps in Appendix G. Click **Next**.

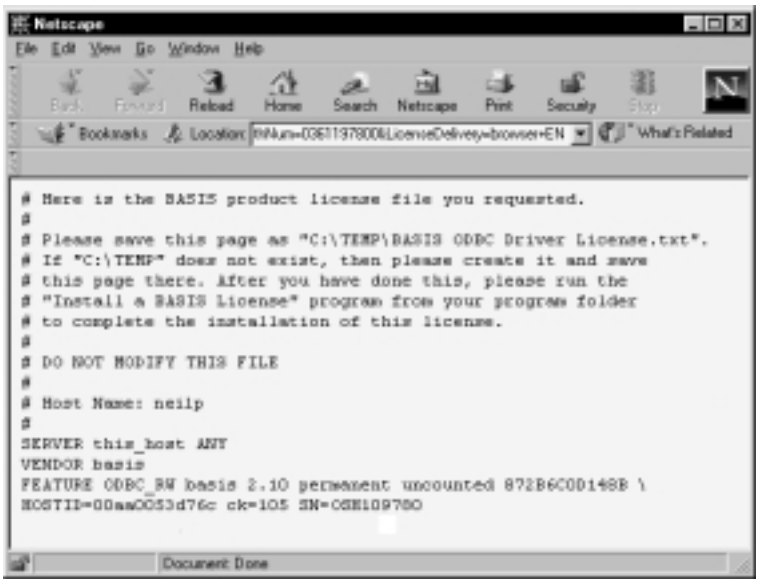


16. The License Information Confirmation screen appears. Check the Serial and Authorization Numbers with those on your License Registration Form and click **OK**.

License Information Confirmation
Please verify that all information below is correct. If any of the following is incorrect, please click Cancel to make the necessary changes.
NOTE: Any incorrect information will result in a failure to process your license registration.
Fax Number:
Email Address:
Serial Number:
Authorization Number:
OK
Cancel

17. Using the default web browser on your computer, your registration information is sent to Basis and a text file (see example below) is sent.

ATTENTION!
An attempt will be made to send your registration via your web browser. If this attempt is unsuccessful, or if you receive an error message, please close your browser and try an alternate registration method such as by fax.
OK


Netscape
File Edit View Go Window Help
Back Forward Reload Home Search Netscape Print Security Stop
Bookmarks Location: What's Related
Here is the BASIS product license file you requested.
#
Please save this page as "C:\TEMP\BASIS ODBC Driver License.txt".
If "C:\TEMP" does not exist, then please create it and save
this page there. After you have done this, please run the
"Install a BASIS License" program from your programs folder
to complete the installation of this license.
#
DO NOT MODIFY THIS FILE
#
Host Name: neilp
#
SERVER this_host ANY
VENDOR basis
FEATURE ODBC_RW basis 2.10 permanent uncounted 872B6C0D148B \
HOSTID=00aa0053d76c ck=105 SN=CSK109780
Document Done

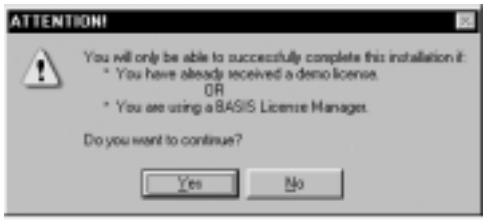
Once you receive the information, follow these instructions:

- Save the page. If the Temp directory does not exist, create it and save the text file in the Temp directory.

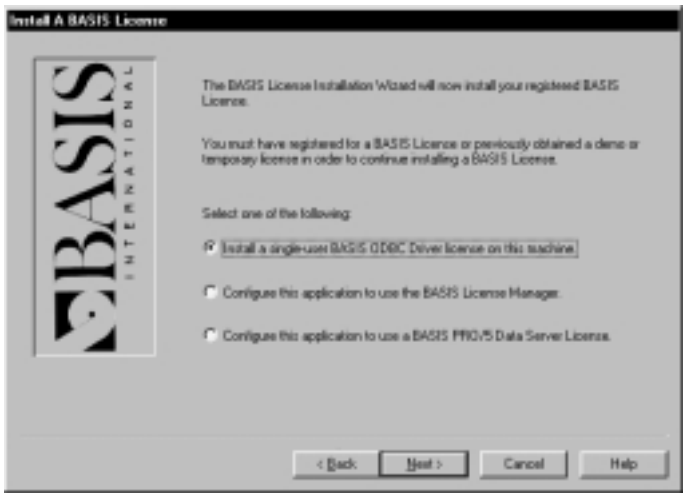
- Select the *BASIS ODBC Driver 3.01* folder and click on the *Install a BASIS License* icon.

License Installation

18. If you have already received the license.txt file, or you are using the BASIS License Manager, this screen appears. Click **Yes**.


ATTENTION!
You will only be able to successfully complete this installation if:
* You have already received a demo license.
OR
* You are using a BASIS License Manager.
Do you want to continue?
Yes
No

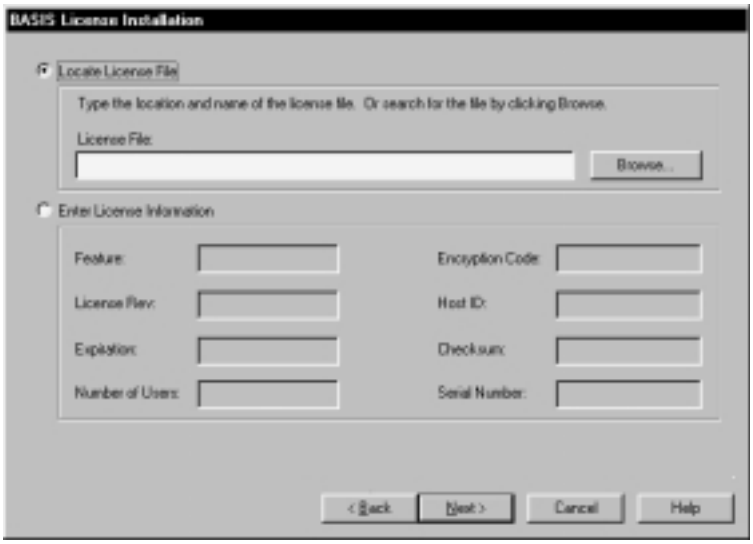
19. The Install a BASIS License screen appears.

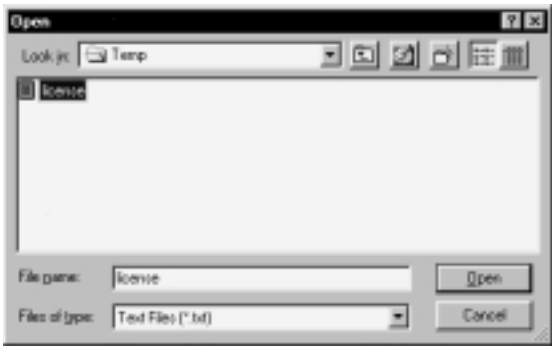

Install A BASIS License
BASIS INTERNATIONAL
The BASIS License Installation Wizard will now install your registered BASIS License.
You must have registered for a BASIS License or previously obtained a demo or temporary license in order to continue installing a BASIS License.
Select one of the following:
Install a single-user BASIS ODBC Driver license on this machine.
Configure this application to use the BASIS License Manager.
Configure this application to use a BASIS PRO/5 Data Server License.
< Back
Next >
Cancel
Help

If you are using a single-user key and you have already received the license file, click **Next**. Then continue with step 20.

If you are using the BASIS License Manager, click "**Configure this application to use the BASIS License Manager**", and then click **Next**. Then skip to step 23.

20. The Locate License File screen appears. Enter the path for the license.txt file or click **Browse** to search your system. An example follows.





Click on **Open** to continue.

21. After you have located the license.txt file, the Installation Successful screen appears.

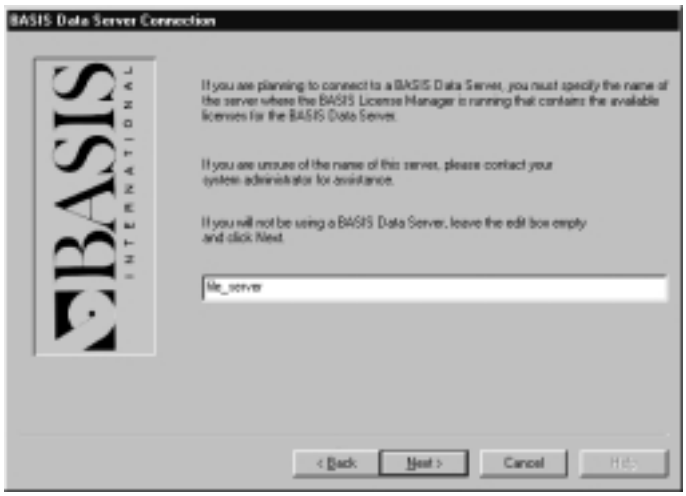
Installation Successful
The BASIS product license file has been successfully installed. Do you want to install another license on this machine?
Yes
No

Click **Yes** and the BASIS License screen appears again.

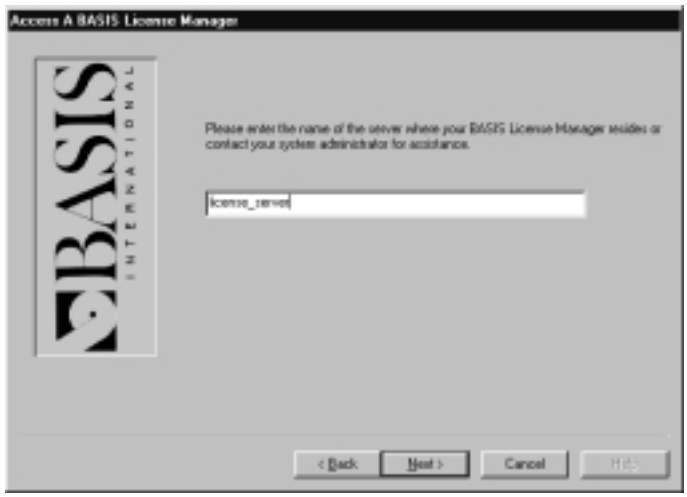
Click **No** to continue.

22. If you use OSAS^{CS} for Windows or UNIX/Linux, enter the name of the server that is running the Data Server. If you are using standard OSAS or OSAS^{CS} for Novell, leave the field blank.

In either case, click **Next** and skip to step 25.

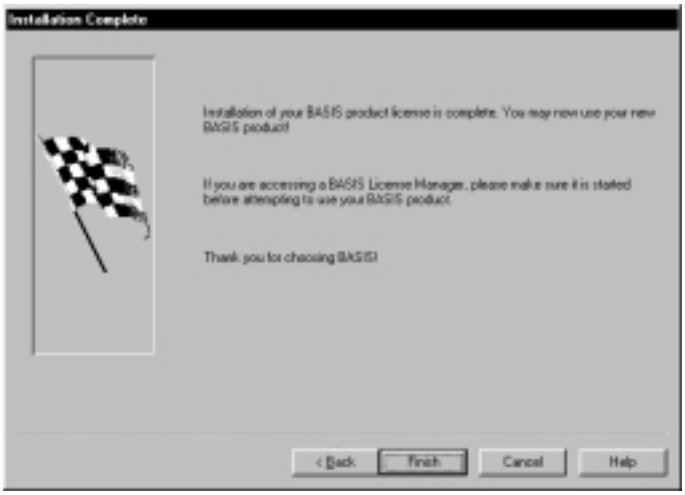

BASIS Data Server Connection
BASIS INTERNATIONAL
If you are planning to connect to a BASIS Data Server, you must specify the name of the server where the BASIS License Manager is running that contains the available licenses for the BASIS Data Server.
If you are unsure of the name of this server, please contact your system administrator for assistance.
If you will not be using a BASIS Data Server, leave the edit box empty and click Next.
< Back
Next >
Cancel

23. If you are using the BASIS License Manager, the following screen appears. Enter the name the server that is running the BASIS License Manager and click **Next**.


Access A BASIS License Manager
BASIS
INTERNATIONAL
Please enter the name of the server where your BASIS License Manager resides or contact your system administrator for assistance.
license_server
< Back
Next >
Cancel

24. The Installation Successful screen appears. Click OK to continue.

25. Click **Finish**.


Installation Complete
Installation of your BASIS product license is complete. You may now use your new BASIS product.
If you are accessing a BASIS License Manager, please make sure it is started before attempting to use your BASIS product.
Thank you for choosing BASIS!
< Back
Finish
Cancel
Help

26. If you do not want to view the readme.txt file uncheck the box. Otherwise, click **Finish**.

Setup Complete
Setup has finished. Some files could not be updated because they are currently in use by other programs on the system. These files will be updated after you reboot your system. It is strongly recommended that you read the accompanying readme.txt file.
View the readme.txt file
Use the check box to view the readme.txt file. After viewing the readme file, you will be prompted to reboot your system.
Thank you for choosing BASIS!
BASIS
INTERNATIONAL
Finish

27. The Setup Complete screen appears. If you do not want to restart your computer, click “No.” If you do want to restart your computer now, first be certain that all other programs are closed and click Finish to activate your ODBC driver.

Setup Complete
BASIS INTERNATIONAL
Setup has finished copying files to your computer.
Before you can use the program, you must restart Windows or your computer.
Yes, I want to restart my computer now.
No, I will restart my computer later.
Remove any disks from their drives, and then click Finish to complete setup.
Finish

28. Before you use the ODBC driver you must:

    - install the ODBC Kit from your OSAS media
    - create the config.tmp file (see page 3-3)

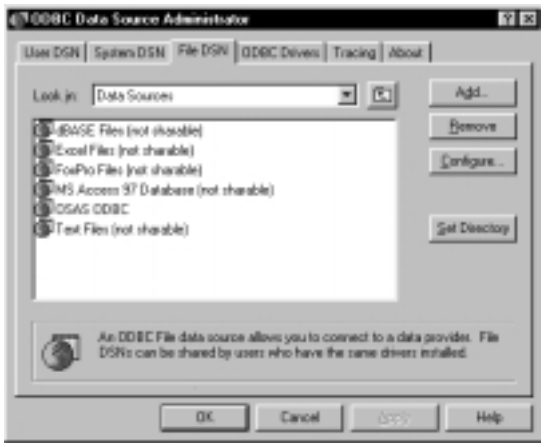
    Once you have completed these two steps, follow the instructions on page 2-19.

Installing ODBC Drivers

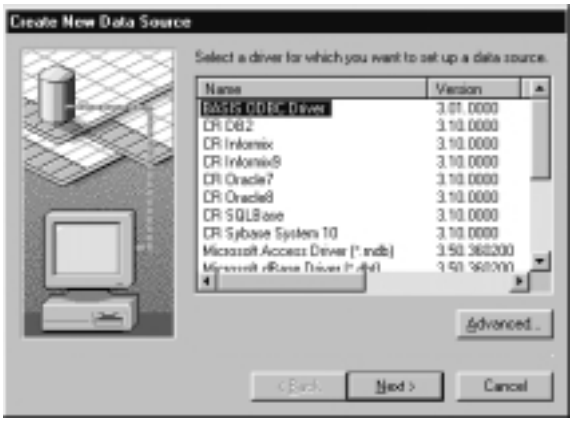
After installing the ODBC media, you need to create and setup your ODBC drivers.

1. From the Control Panel, select **32 bit ODBC Administrator**.

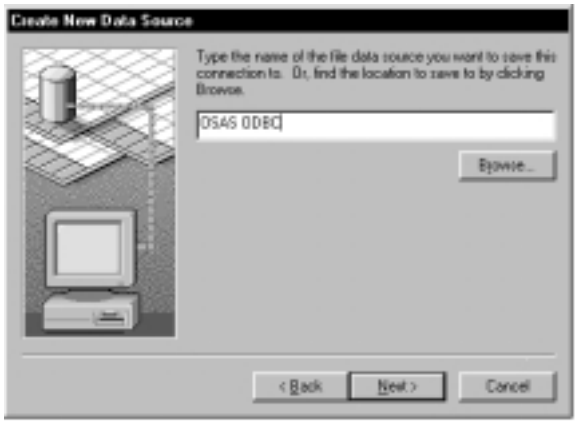
2. On the ODBC Data Source Administrator screen, select the tab **File DSN** and click **Add**.



3. Highlight the ODBC Driver selection and click **Next**.



4. Enter the name for your ODBC driver. For example, in the screen below, OSAS ODBC has been used. Click **Next**


Create New Data Source
Type the name of the file data source you want to save this connection to. Or, find the location to save to by clicking Browse.
OSAS ODBC
Browse...
< Back
Next >
Cancel

5. The next screen displays the information you have entered. Verify that it is correct and click **Finish**. If not, click **Back** and reenter the information as needed.

Create New Data Source
When you click finish, you will create the data source which you have just configured. The driver may prompt you for more information.
File Data Source
Filename: DSAS ODBC
Driver: BASIS ODBC Driver
< Back
Finish
Cancel

6. The Driver Data Source Configuration screen appears next. In the Database field, enter the path for your config.tpm file To locate the file, click **Browse**.

7. Click **OK** to finish.

To enhance the usability of your ODBC driver, click the “Pad variable length column with spaces” box.

If you are allowing only read access, click on the “Read Only Access” box.

Click **OK** to continue.

8. Click **OK** to finish the ODBC setup procedure.

Proceed to any of the following, depending on the application you will be using to manipulate the data, see:

Microsoft Access	Appendix A
Microsoft Excel	Appendix B
Microsoft Query	Appendix C
Microsoft Word	Appendix D
Crystal Reports	Appendix E

Create/Edit CONFIG.TPM 3

Edit CONFIG.TPM 3-3

Edit CONFIG.TPM

Features

Use the Edit CONFIG.TPM function to create and edit database configuration files for the BASIS ODBC driver.

You must create a database configuration file for each company you want to access with the ODBC driver. If you have multiple companies, name each configuration file with some variation of the company ID and the TPM file extension. For example, name the configuration file CONFGHHH.TPM for the company whose ID is HHH.

Note

If you want to use the report applets (Microsoft Excel spreadsheets) that come with the ODBC Kit, you must store your configuration file in a directory called WINDOWS on the C: drive of each computer where the ODBC driver is installed.

Enter the file path and database configuration filename in the Database Configuration field in the BASIS ODBC Driver Data Source Setup dialog box when you install the BASIS ODBC driver or when you access OSAS data using the BASIS ODBC driver.

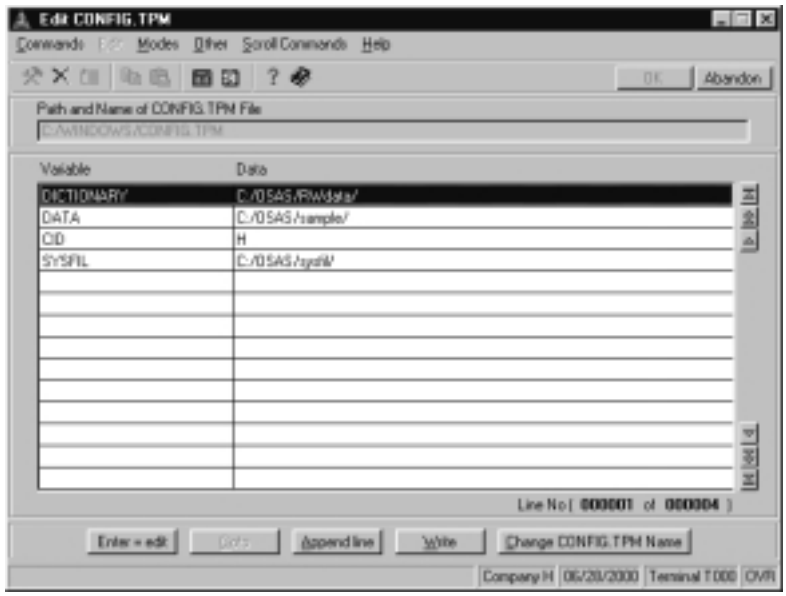
Reports

No report is associated with this function.

Screen Use

Screen	Description
Edit CONFIG.TPM	Use the Edit CONFIG.TPM screen to create and edit database configuration files.

Edit CONFIG.TPM Screen



Field Definitions

Field Name	Description
Path and Name of CONFIG.TPM File	Enter the file path and name of the database configuration file you want to work with. Enter a \ at the end of a directory path. If you enter a new path or database configuration file name, a skeleton file is built.

Field Name	Description
Dictionary	Enter the file path to the data dictionary files.
Data	Enter the file path to the company data.
CID	Enter the company ID for the database configuration file.
Sysfil	Enter the file path to the system data files.

Command Bar Definitions

Command	Description
Enter = edit	Move the prompt to the line to edit and press **Enter**.
Append Line	Press **A** to add a line.
Write	Press **W** to save your changes.
Change CONFIG.TPM Names	Press **C** to save your changes to a new configuration file.

Saving and Exiting

To save your entries and exit to the Main menu, press **W** and use the **Proceed** (**OK**) command.

Dictionary Tools 4

Introduction	4-3
Copy File(s) To Dictionary	4-5
Files	4-9
Fields	4-17
Indexes	4-27
Add/Change Reserved Words	4-33
Tables	4-35

Introduction

Use the functions in this chapter to set up and maintain files, fields, and indexes in the main data dictionary for the companies installed in OSAS, to delete unnecessary file definitions, and to maintain the list of reserved SQL words.

Copy File(s) To Dictionary

Features

Use the Copy File(s) To Dictionary function to copy file, field, and index definitions from one data dictionary to another.

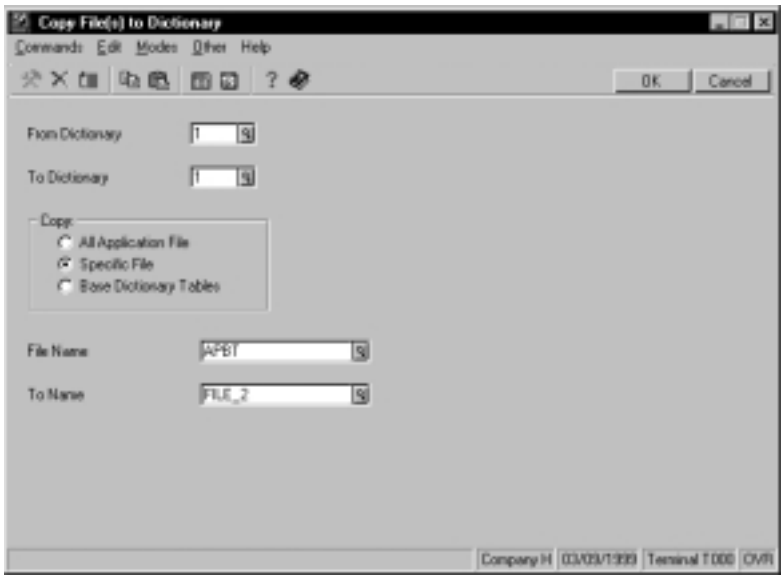
Reports

No report is associated with this function.

Screen Use

Screen	Description
Copy File(s) To Dictionary	Use the Copy File(s) To Dictionary screen to copy file, field, and index definitions from one file to another.

Copy File(s) To Dictionary Screen



Field Definitions

	Field Name	Description
Inquiry	From Dictionary	Enter the extension of the data dictionary to copy from.
Inquiry	To Dictionary	Enter the extension of the data dictionary to copy to.
	Copy	To copy all application files, enter **1**; to copy a specific file, enter **2**; to copy base dictionary tables, enter **3**.
	Application ID	If you entered **1**, enter the application you want to copy file information from.
Inquiry	File Name/To Name	If you entered **2**, enter name of the file to copy file information from and the name to copy to.

Command Bar Definitions

This screen has no command bar.

Saving and Exiting

To save your entries and exit to the Main menu, use the **Proceed (OK)** command.

Files

Features

Use the Files function to set up and maintain data dictionary information about the data files used in OSAS programs, to construct views of the OSAS data files, and to delete unnecessary file definitions from the data dictionary. Back up data dictionary files—files with .1 as the file extension—before you delete, modify, or create files in case you make mistakes.

A *view* is a structured query language (SQL) term that represents a glimpse at the data contained in your files. The fields in a view can be from more than one file. Views can also have criteria applied. For example, a view can include vendor names and mailing addresses for a form letter, but include only vendors in a selected state. You should be familiar with SQL or become familiar with the predefined views in the data dictionary before creating views.

You should be familiar with BB^X field and file types in order to append files to the data dictionary. Back up your data dictionary files before you create files; then you can restore the dictionaries if problems occur.

Use the Files function to delete unnecessary file definitions from your data dictionary to increase performance and decrease the amount of disk space used by the shadow dictionary.

Reports

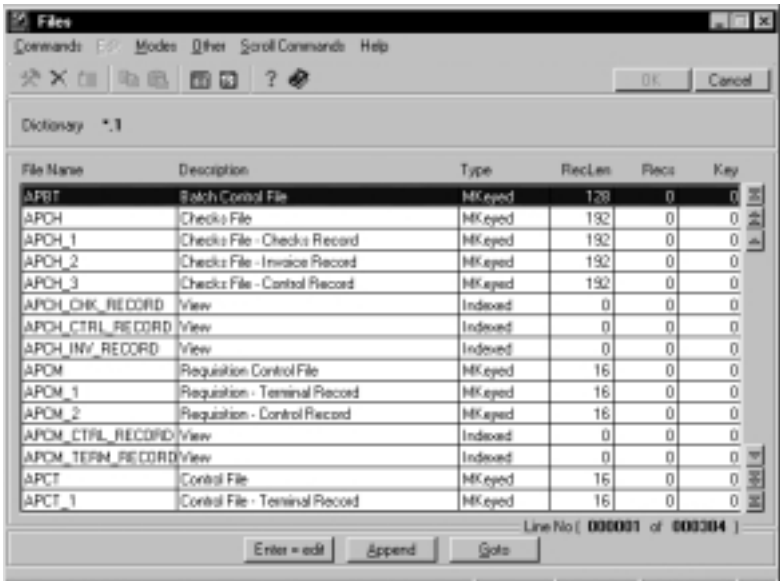
No report is associated with this function.

Screen Use

Screen	Description
Files	Use the Files screen to set up and maintain information about the OSAS data files in the data dictionary.

Screen	Description
Edit/Append Files	Use the Edit/Append File screen to add and edit the OSAS data file information in the data dictionary.
Edit File View Information	Use the Edit File View Information screen to add and edit the WHERE clause and files included in the view.

Files Screen


Files
Commands Edit Modes Other Scroll Commands Help
OK Cancel
Dictionary *.1
File Name Description Type RecLen Recs Key
APBT Batch Control File MKeyed 128 0 0
APCH Checks File MKeyed 192 0 0
APCH_1 Checks File - Checks Record MKeyed 192 0 0
APCH_2 Checks File - Invoice Record MKeyed 192 0 0
APCH_3 Checks File - Control Record MKeyed 192 0 0
APCH_CHK_RECORD View Indexed 0 0 0
APCH_CTRL_RECORD View Indexed 0 0 0
APCH_INV_RECORD View Indexed 0 0 0
APCM Requisition Control File MKeyed 16 0 0
APCM_1 Requisition - Terminal Record MKeyed 16 0 0
APCM_2 Requisition - Control Record MKeyed 16 0 0
APCM_CTRL_RECORD View Indexed 0 0 0
APCM_TERM_RECORD View Indexed 0 0 0
APCT Control File MKeyed 16 0 0
APCT_1 Control File - Terminal Record MKeyed 16 0 0
Line No [000001 of 000304]
Enter = edit
Append
Goto

Field Definitions

Field Name	Description
File Name	Enter the file name.
Description	Enter the file description.
Type	Enter the file type.

Field Name	Description
RecLen	Enter the file record length.
Recs	Enter the number of records in the file.
Key	Enter the number of keys in the file.

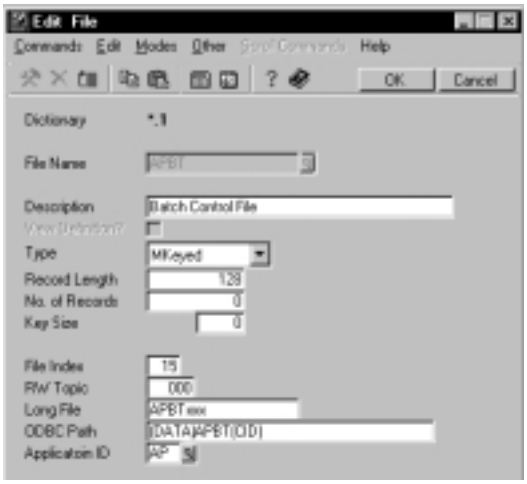
Command Bar Definitions

Command	Description
Enter = edit	Move the prompt to the line you want to edit and press **Enter**.
Append	Press **A** to add a file.
Goto	Press **G** to go to a specific file.

Saving and Exiting

To save your entries and exit to the Main menu, use the **Proceed (OK)** command.

Edit File Screen



Field Definitions

Inquiry

Field Name	Description
Dictionary	The dictionary file extension is displayed.
File Name	Enter the file name.
Description	Enter the file description.
View Definition	If the file is a view, check the box or enter **Y**; if not, uncheck the box or enter **N**.

Field Name	Description
Type	Enter the file type: **I** = Indexed **L** = Serial **K** = Keyed **S** = String **P** = Program **D** = Directory **M** = Mkeyed
Record Length	Enter the file record length.
Key Size	Enter the key size if the file is a single keyed or mkeyed file.
File Index	Enter the file index that the file is usually opened on.
RW Topic	Enter the GENERAL Report Writer topic within OSAS software.
Long File Name	Enter the long file name for the file.
ODBC Path	Enter the path ODBC will use to see the file. Use the variables (DATA) to specify the data path, and (CID) to specify a company-specific file. These variables are defined in the CONFIG.TPM file.
Inquiry Application ID	Enter the application ID for the file.

Command Bar Definitions

This screen does not have a command bar.

Saving and Exiting

To save your entries and exit to the Files screen, use the **Proceed (OK)** command.

Edit File View Information Screen

Field Definitions

Field Name	Description
Dictionary	The dictionary extension is displayed.
Where Clause	Enter the SQL WHERE clause selection criteria. Use single quotation marks around strings. For example, APVE.VENDORID = ’ACE001’.
File Name	Enter the file names.

Command Bar Definitions

Command	Description
Append	Press **A** to add a file to link to from the current view file.
Write	Press **W** to save your changes.
Select Statement	Press **S** to edit the WHERE clause.

Saving and Exiting

To save your entries and exit to the Main menu, press **W** and use the **Proceed (OK)** command.

Fields

Features

Use the Fields function to define and edit the fields in the data dictionary files.

Unless you are working with views, you must be familiar with BB^{X} field types and the file layout in order to define fields. If you are working with a view, build the field definitions from existing files with the **Build view from file** command.

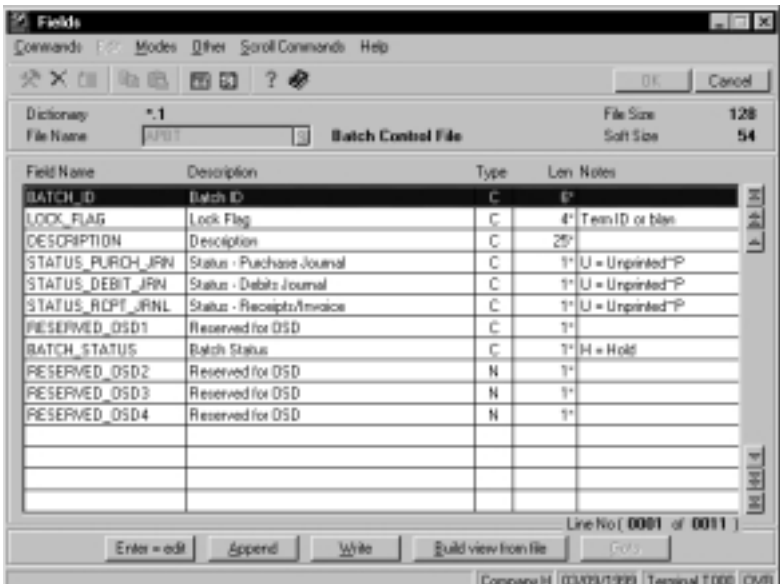
Reports

No report is associated with this function.

Screen Use

Screen	Description
Fields	Use the Fields screen to define fields in the data dictionary files.
Edit/Append Fields	Use the Edit/Append Fields screen to edit and add fields in the data dictionary files.
Fields View	Use the Fields View screen to define and build fields in view files.
Build View From File	Use the Build View From File screen to import field definitions into a view.
Update Fields	Use the Update Fields screen to update identical fields in the data dictionary files.

Fields Screen



Field Definitions

Inquiry

Field Name	Description
Dictionary	The dictionary file extension is displayed.
File Name	Enter the file name to edit.
(Description)	The file description is displayed.
File Size	The file size is displayed.
Soft Size	The file soft size—the total of all field lengths added together plus the total number of fields in the file—is displayed.
Description	The field description is displayed.
Type	The field type is displayed.

Field Name	Description
Len	The field length is displayed.
Notes	The field notes are displayed.

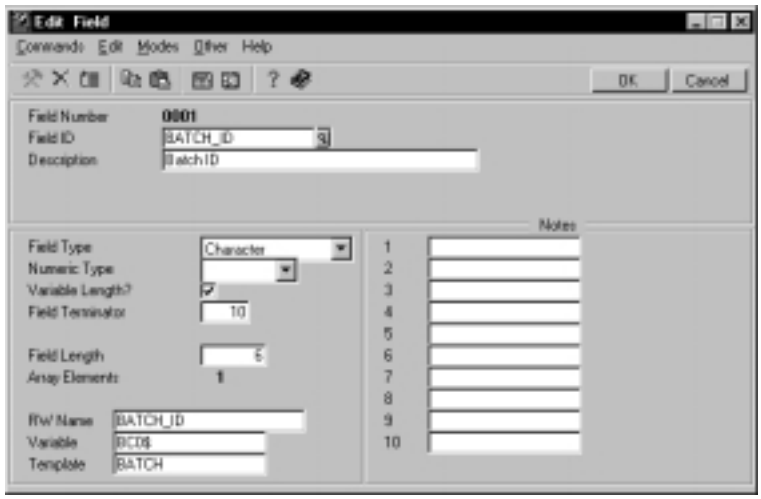
Command Bar Definitions

Command	Description
Enter = edit	Move the prompt to the line you want to edit and press **Enter**.
Append	Press **A** to add a file.
Write	Press **W** to save your changes.
Build view from file	Press **B** to build fields from a file. This option is available only when the file selected is a view. Enter the filename to build the fields from in the screen that appears.
Goto	Press **G** to go to a specific file.

Saving and Exiting

To save your entries and exit to the Main menu, press **W** and use the **Proceed (OK)** command.

Edit/Append Fields Screen



Field Definitions

Field Name	Description
Field Number	The field number is displayed.
Field ID	Enter the field ID. Any word you enter is checked against the reserved word file, and a warning appears if you enter a reserved word. A reserved word is a key word from a third party ODBC and SQL language that should not be used for field names.
Description	Enter the field description.

Field Name	Description
Field Type	Enter one of the following letters for the type of field: C = Character N = Numeric U = Unsigned Integer I = Signed Integer F = IEEE Float D = BCD Float B = Business Math X = 'C' Float Y = 'C' Double
Numeric Type	If the numeric is a Boolean, enter **B**. If the numeric is a date, enter **J**. If the numeric is any other numeric, enter **O**. If the field type is non-numeric, this field is not available.
Variable Length?	If the field is of variable length and requires a field terminator, check the box or enter **Y**; if not, uncheck the box or enter **N**.
Field Terminator	Enter the decimal code that is used to represent a field terminator in your file. All OSAS standard files use **10** for their field terminator.
Field Length	Enter the length of the field in bytes.
Array Elements	This field is set to 1 and cannot be changed.
RW Name	Enter the name to be used in the GENERAL Report Writer.
Variable	Enter the variable ID used to represent the field. If this application uses string templates, leave the field blank.
Template	Enter the string template ID.
Notes	Enter any descriptive notes.

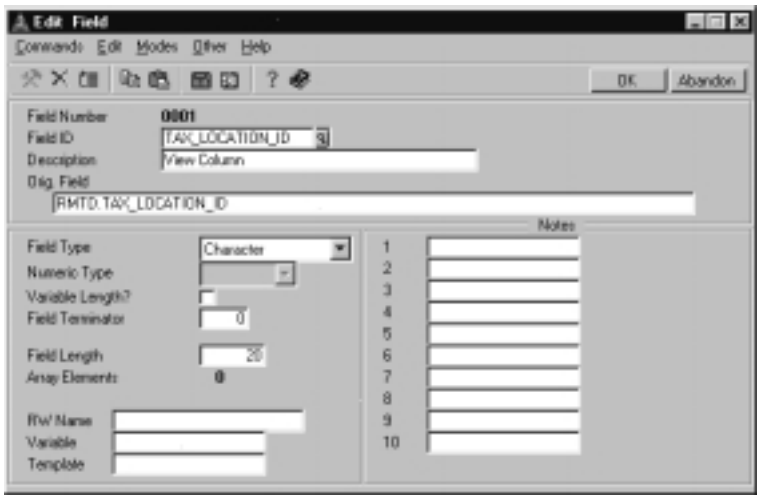
Command Bar Definitions

This screen does not have a command bar.

Saving and Exiting

To save your entries, use the **Proceed (OK)** command. The other fields are scanned for matching field names. If data changes have been made, the Update Fields screen appears to update other fields with the changed data.

Fields View Screen



Field Definitions

Field Name	Description
Dictionary	The dictionary file extension is displayed.
File Name	Enter the file name to edit.
File Size	The file size is displayed.

Field Name	Description
Soft Size	The file soft size—the total of all field lengths added together plus the total number of fields in the file—is displayed.
Field Number	Enter the field ID. Any word you enter is checked against the reserved word file, and warning appears if you enter a reserved word. A reserved word is a key word from a third party ODBC and SQL language that cannot be used for field names.
Description	The field description for view files is View Column.
Field Type	Enter one of the following letters for the type of field: C = Character N = Numeric U = Unsigned Integer I = Signed Integer F = IEEE Float D = BCD Float B = Business Math X = 'C' Float Y = 'C' Double
Numeric Type	If the numeric is a Boolean, enter **B**. If the numeric is a date, enter **J**. If the numeric is any other numeric, enter **O**. If the field type is non-numeric, this field is not available.
Variable Length?	If the field is of variable length and requires a field terminator, the box or enter **Y**; if not, uncheck the box or enter **N**.
Field Terminator	Enter the decimal code that is used to represent a field terminator in your file. All OSAS standard files use **10** for their field terminator.
Field Length	Enter the length of the field in bytes.
Array Elements	This field is set to 1 and cannot be changed.

Field Name	Description
RW Name	Enter the name to be used in the GENERAL Report Writer.
Variable	Enter the variable ID used to represent the field. If this application uses string templates, leave the field blank.
Notes	Enter any descriptive notes.

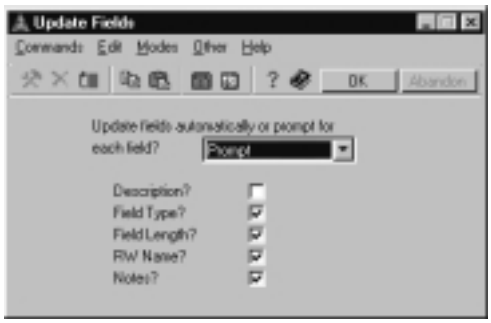
Command Bar Definitions

Command	Description
Enter = edit	Move the prompt to the line you want to edit and press **Enter**.
Append	Press **A** to add a file.
Write	Press **W** to save your changes.
Build view from file	Press **B** to build fields from a file. This option is available only when the file selected is a view. Enter the file name to build the fields from in the screen that appears.

Saving and Exiting

To save your entries and exit to the Main menu, press **W** and use the **Proceed (OK)** command. The other fields are scanned for matching field names. If data changes have been made, the Update Fields screen appears to update other fields with the changed data.

Update Fields Screen



Field Definitions

1. Enter **Automatic** to have fields updated by the system; enter **Prompt** if you want to be prompted for every field to be appended or changed.

2. If you want to update the description with changes, check the box or enter **Y**; if not, uncheck the box or enter **N**.

3. If you want to update the field type with changes, check the box or enter **Y**; if not, uncheck the box or enter **N**.

4. If you want to update the field length with changes, check the box or enter **Y**; if not, uncheck the box or enter **N**.

5. If you want to update the GENERAL Report Writer name with changes, check the box or enter **Y**; if not, uncheck the box or enter **N**.

6. If you want to update the notes with changes, check the box or enter **Y**; if not, uncheck the box or enter **N**.

Command Bar Definitions

This screen has no command bar.

Saving and Exiting

To save your entries and return to the Fields screen, press **P** or **A** and use the **Proceed (OK)** command. If you select **P**, enter your options for each changed or appended field.

Indexes

Features

Use the Indexes function to define the keys used in OSAS Mkeyed data files.

You must be familiar with BB^{X} field and file types in order to use this function.

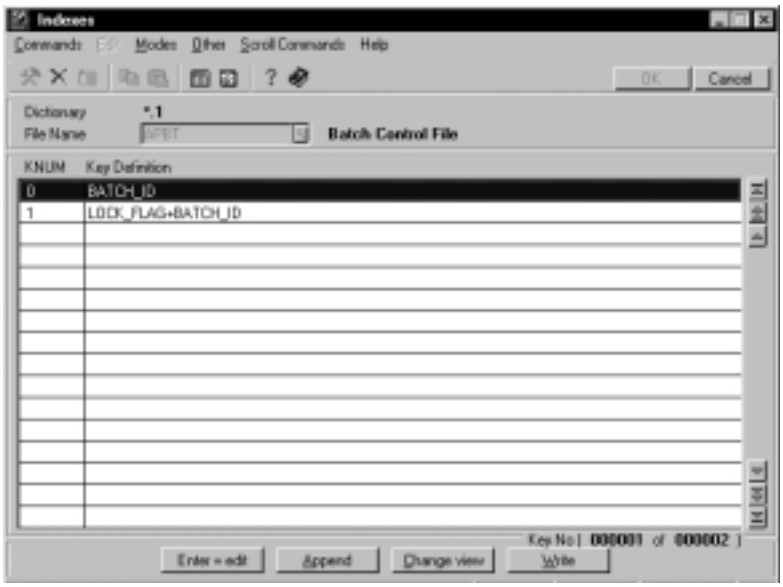
Reports

No report is associated with this function.

Screen Use

Screen	Description
Indexes	Use the Indexes screen to add and edit data dictionary information about the keys used in OSAS MKeyed data files.

Indexes Screen



Field Definitions

Inquiry

Field Name	Description
Dictionary	The current data dictionary extension is displayed.
File Name	Enter the name of the file to work with.
File Size	The file size is displayed.
Soft Size	The file soft size—the total of all field lengths added together plus the total number of fields in the file—is displayed.
KNUM	The key order number is displayed.
Key	The key name is displayed.
Definition	The key definition is displayed.

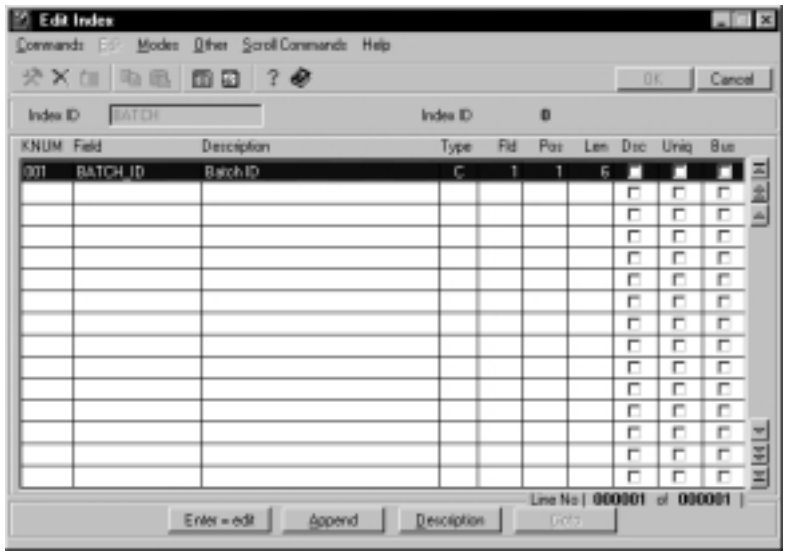
Command Bar Definitions

Command	Description
Enter = edit	Move the prompt to the line to edit and press **Enter**.
Append	Press **A** to add an index.
Change View	Press **C** to switch between the field view and key segment view of the file.
Write	Press **W** to save your changes.

Saving and Exiting

To save your entries and exit to the Main menu, press **W** and use the **Proceed (OK)** command.

Append/Edit Indexes Screen


Edit Index
Commands Edit Modes Other Scroll Commands Help
OK Cancel
Index ID BATCH
Index ID 0
KNUM Field Description Type Fld Pos Len Dsc Uniq Bus
001 BATCH_ID Batch ID C 1 1 6
Line No 000001 of 000001
Enter = edit Append Description Copy

Field Definitions

Field Name	Description
Index ID	Enter an ID to identify the key.
Seq	The sequence number is displayed.
Field	Enter the field name to use in the segment, or leave the field blank if the segment consists of more than one field. If you enter a field name, the description, type, field, position, and length are displayed.
Description	Enter the description for the segment.
Type	The field type is displayed: **C** for character, **N** for numeric.
Fld	Enter the field number.

Field Name	Description
Pos	Enter the starting position of the field in a string.
Len	Enter the total length of the field.
Dsc	Check the box or enter **Y** if the field is in descending sort order; if not, uncheck the box or enter **N**.
Uniq	Check the box or enter **Y** if the field is a unique field; if not, uncheck the box or enter **N**. Enter **N** for standard OSAS files.
Bus	Check the box or enter **Y** if the field is a business math type and must be sorted as such; if not, uncheck the box or enter **N**. Enter **N** for standard OSAS files.

Command Bar Definitions

Command	Description
Enter = edit	Move the prompt to the line to edit and press **Enter**.
Append	Press **A** to add an index.
Description	Press **D** to edit the index ID description.

Saving and Exiting

To save your entries and exit to the Main menu, use the **Proceed (OK)** command.

Add/Change Reserved Words

Features

Use the Add/Change Reserved Words function to add or update the file of reserved Structured Query Language (SQL) words or to other words you want flagged as reserved.

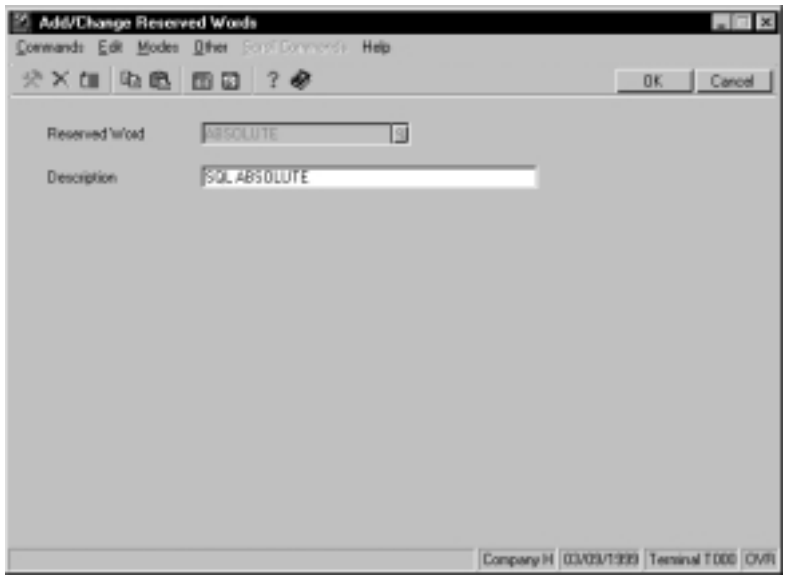
Reports

No report is associated with this function.

Screen Use

Screen	Description
Add/Change Reserved Words	Use the Add/Change Reserved Words screen to update the reserved words file.

Add/Change Reserved Words Screen



Field Definitions

	Field Name	Description
Inquiry	Reserved Word	Enter the reserved word.
	Description	Enter a description for the reserved word.

Command Bar Definitions

This screen has no command bar.

Saving and Exiting

To save your entries and exit to the Main menu, use the **Proceed (OK)** command.

Tables

Use the Tables function to set up and maintain the ODBC Kit table.

Tables store information about the system, data, options, and default settings for other applications.

The following tables are related to the ODBC Kit:

- OPT
- ODEXTxxx

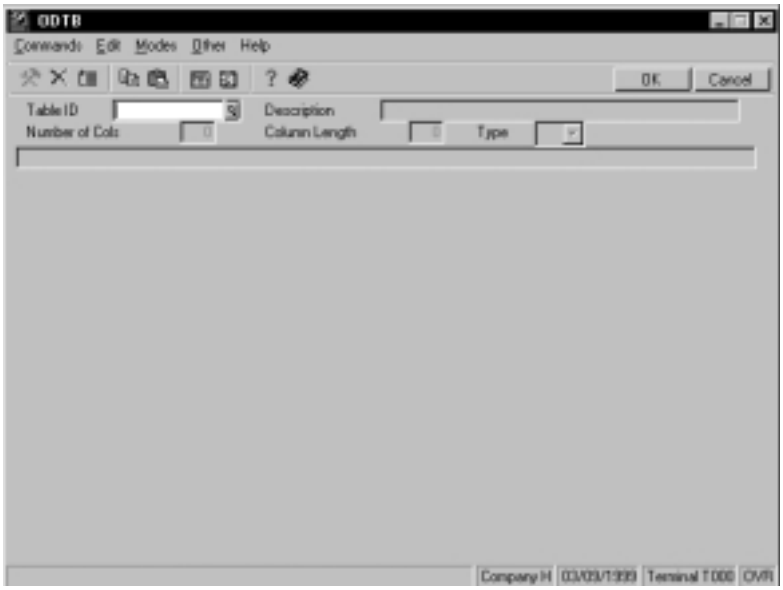
For more information about the ODEXTxxx table, see its individual description in this section.

The OPT (Options) tables store options and interfaces settings. Maintain the information stored in this table through Resource Manager functions, not through the table itself.

Screen Use

Screen	Description
Tables Screen	Use the Tables screen to edit table fields.
ODEXTxxx Tables Screen	Use the ODEXTxxx Tables screen to edit the data dictionary file extension used by your terminal.

Tables Screen



Inquiry

1. To add or change a table, enter the table ID (A8). To set up a company-specific table, enter the table ID plus the one- to three-character company ID. To set up a terminal-specific table, enter the table ID plus the three-character terminal ID. To delete the table, use the **Delete (F3)** command.

2. If you entered a new table ID, the Copy From field appears (A8). To copy a company- or terminal-specific table, enter the table ID plus the company ID and terminal ID.

   A set of tables comes with the sample company, Builders Supply. You can copy the sample tables for a company and then change the appropriate fields. To copy a sample table, enter the table ID.

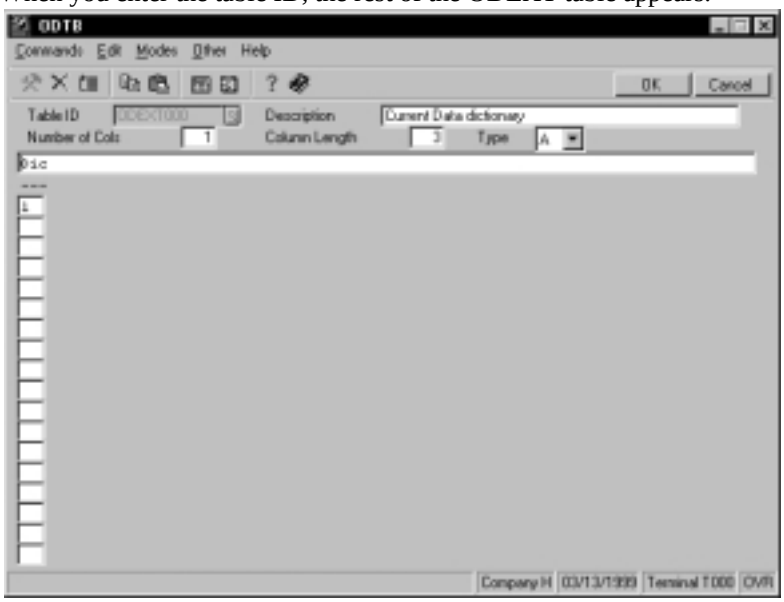
3. Accept the displayed description of the table, or enter a different description (A40).

The number of columns, the length of the columns, and the type of characters you can enter—alphanumeric (A), numeric (N), or numeric with one to four decimal places—are displayed.

ODEXTxxx Table

The ODEXT table stores the data dictionary file extension in use for the current terminal, where xxx is the current terminal ID.

When you enter the table ID, the rest of the ODEXT table appears.



Field	Description
Dic (A3)	Enter the data dictionary file extension for the current terminal.

Dictionary Reports 5

Introduction	5-3
Dictionary Field List	5-5
Audit Field Names For Reserved Words	5-9
Reserved Words List	5-13

Introduction

Use the functions in this chapter to verify that file and field names are not SQL reserved word and print a report of file and field names that are SQL reserved words, to print a list of reserved SQL words, and to print a list of the field names used in files.

Dictionary Field List

Features

Use the Dictionary Field List function to produce a printout by field name across files. Use the list to verify the consistency of field names in related files.

Reports

A sample Dictionary Field List is on page 5-7

Screen Use

Screen	Description
Dictionary Field List	Use the Dictionary Field List screen to select the field and files names to list.

Dictionary Field List Screen

Field Definitions

The current data dictionary extension is displayed.

Inquiry

1. Enter the range of field IDs to include in the list.

Inquiry

2. Enter the range of file names to include in the list.

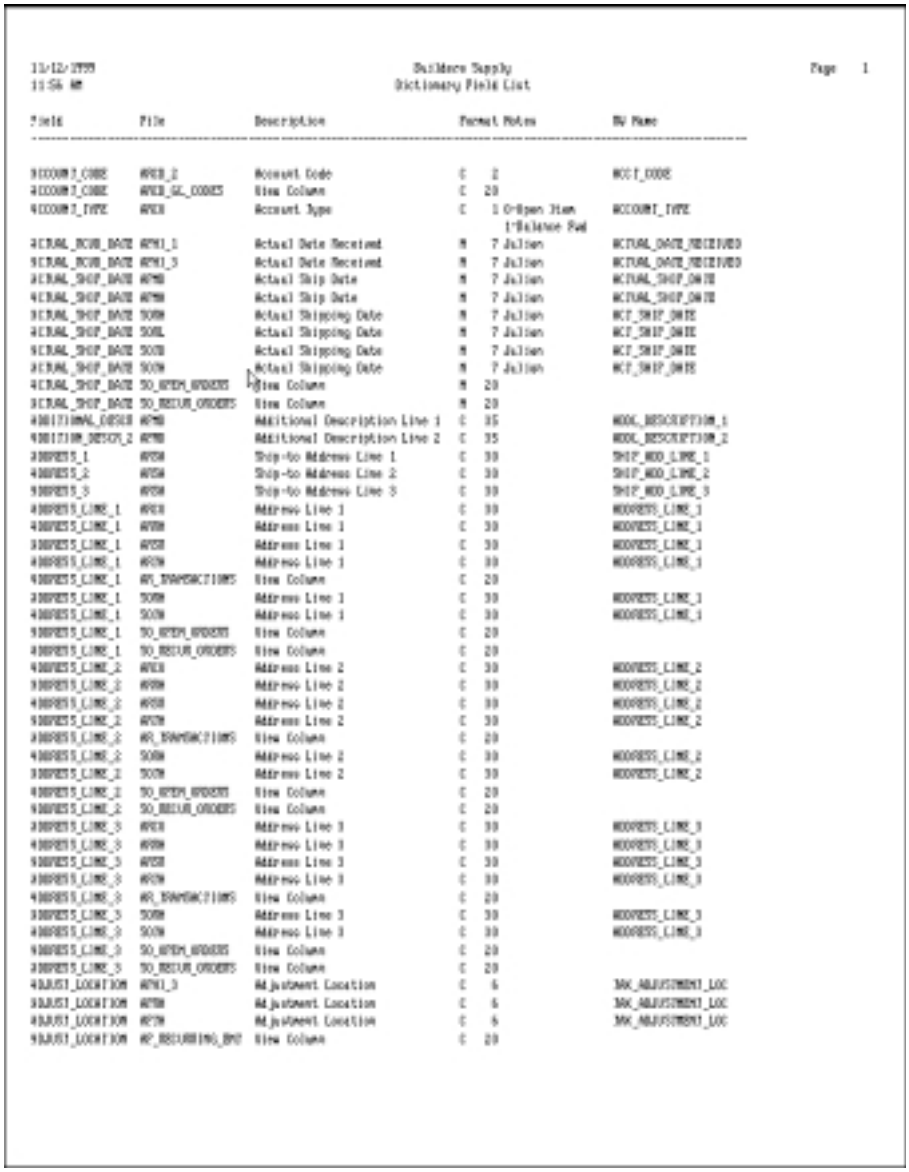
3. Select the order in which to organize the list.

Saving and Exiting

Select the output device to begin printing the list.

After the list is produced, the Dictionary Reports menu appears.

Dictionary Field List



11/12/1999 Builders Supply Page 1
11:54 AM Dictionary Field List

Field	File	Description	Format	Notes	DV Name
9ICCOUNT_CODE	AMER_1	Account Code	C 1		ACCT_CODE
4ICCOUNT_CODE	AMER_GL_CODES	View Column	C 20		
4ICCOUNT_TYPE	AMER	Account Type	C 1	O=Open Item 1=Balance Fwd	ACCOUNT_TYPE
4ICTUAL_RCVD_DATE	AMM1_1	Actual Date Received	N 7	Julian	ACTUAL_DATE_RECEIVED
9ICTUAL_RCVD_DATE	AMM1_3	Actual Date Received	N 7	Julian	ACTUAL_DATE_RECEIVED
3ICTUAL_SHIP_DATE	AMM8	Actual Ship Date	N 7	Julian	ACTUAL_SHIP_DATE
4ICTUAL_SHIP_DATE	AMM8	Actual Ship Date	N 7	Julian	ACTUAL_SHIP_DATE
3ICTUAL_SHIP_DATE	SOHH	Actual Shipping Date	N 7	Julian	ACT_SHIP_DATE
4ICTUAL_SHIP_DATE	SOHL	Actual Shipping Date	N 7	Julian	ACT_SHIP_DATE
9ICTUAL_SHIP_DATE	SOTD	Actual Shipping Date	N 7	Julian	ACT_SHIP_DATE
3ICTUAL_SHIP_DATE	SOTH	Actual Shipping Date	N 7	Julian	ACT_SHIP_DATE
4ICTUAL_SHIP_DATE	SO_NTEM_NMBERS	View Column	N 20		
3ICTUAL_SHIP_DATE	SO_RECUR_ORDERS	View Column	N 20		
4DDITIONAL_DESCR	AMM8	Additional Description Line 1	C 35		MDSE_DESCRIPTION_1
9DDITION_DESCR_2	AMM8	Additional Description Line 2	C 35		MDSE_DESCRIPTION_2
3DDRESS_1	AMSH	Ship-to Address Line 1	C 30		SHIP_MDD_LINE_1
4DDRESS_2	AMSH	Ship-to Address Line 2	C 30		SHIP_MDD_LINE_2
9DDRESS_3	AMSH	Ship-to Address Line 3	C 30		SHIP_MDD_LINE_3
4DDRESS_LINE_1	AMER	Address Line 1	C 30		MDDRESS_LINE_1
4DDRESS_LINE_1	AMHH	Address Line 1	C 30		MDDRESS_LINE_1
3DDRESS_LINE_1	AMSH	Address Line 1	C 30		MDDRESS_LINE_1
4DDRESS_LINE_1	AMTH	Address Line 1	C 30		MDDRESS_LINE_1
9DDRESS_LINE_1	AR_TRNSHCTIONS	View Column	C 20		
3DDRESS_LINE_1	SOHH	Address Line 1	C 30		MDDRESS_LINE_1
4DDRESS_LINE_1	SOTH	Address Line 1	C 30		MDDRESS_LINE_1
9DDRESS_LINE_1	SO_NTEM_NMBERS	View Column	C 20		
4DDRESS_LINE_1	SO_RECUR_ORDERS	View Column	C 20		
4DDRESS_LINE_2	AMER	Address Line 2	C 30		MDDRESS_LINE_2
9DDRESS_LINE_2	AMHH	Address Line 2	C 30		MDDRESS_LINE_2
4DDRESS_LINE_2	AMSH	Address Line 2	C 30		MDDRESS_LINE_2
9DDRESS_LINE_2	AMTH	Address Line 2	C 30		MDDRESS_LINE_2
3DDRESS_LINE_2	AR_TRNSHCTIONS	View Column	C 20		
4DDRESS_LINE_2	SOHH	Address Line 2	C 30		MDDRESS_LINE_2
3DDRESS_LINE_2	SOTH	Address Line 2	C 30		MDDRESS_LINE_2
4DDRESS_LINE_2	SO_NTEM_NMBERS	View Column	C 20		
9DDRESS_LINE_2	SO_RECUR_ORDERS	View Column	C 20		
3DDRESS_LINE_3	AMER	Address Line 3	C 30		MDDRESS_LINE_3
4DDRESS_LINE_3	AMHH	Address Line 3	C 30		MDDRESS_LINE_3
9DDRESS_LINE_3	AMSH	Address Line 3	C 30		MDDRESS_LINE_3
3DDRESS_LINE_3	AMTH	Address Line 3	C 30		MDDRESS_LINE_3
4DDRESS_LINE_3	AR_TRNSHCTIONS	View Column	C 20		
3DDRESS_LINE_3	SOHH	Address Line 3	C 30		MDDRESS_LINE_3
4DDRESS_LINE_3	SOTH	Address Line 3	C 30		MDDRESS_LINE_3
9DDRESS_LINE_3	SO_NTEM_NMBERS	View Column	C 20		
3DDRESS_LINE_3	SO_RECUR_ORDERS	View Column	C 20		
4DJUST_LOCATION	AMM1_3	Adjustment Location	C 6		INV_ADJUSTMENT_LOC
3DJUST_LOCATION	AMTH	Adjustment Location	C 6		INV_ADJUSTMENT_LOC
4DJUST_LOCATION	AMTH	Adjustment Location	C 6		INV_ADJUSTMENT_LOC
9DJUST_LOCATION	AP_RECURRING_ENT	View Column	C 20		

Audit Field Names For Reserved Words

Features

Use the Audit Field Names for Reserved Words function to validate an application for reserved words or check all applications for reserved words.

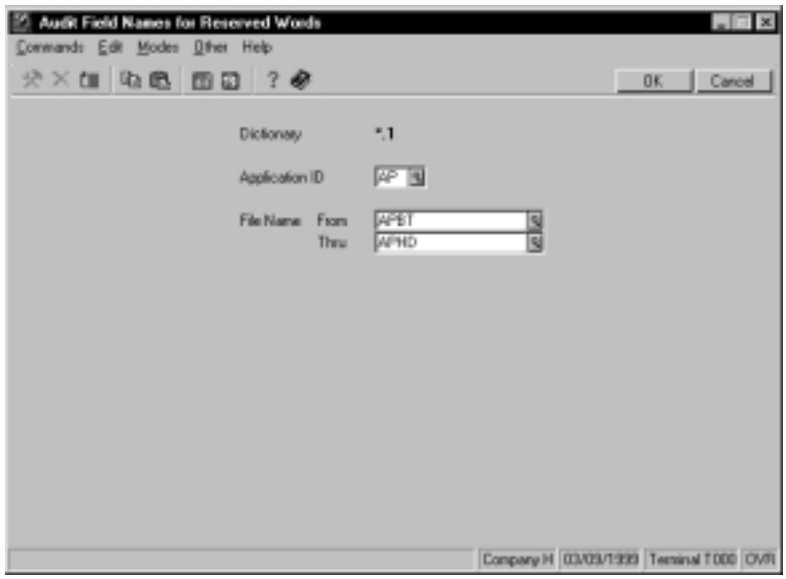
Reports

A sample Audit Field Names For Reserved Words List is on page 5-11.

Screen Use

Screen	Description
Audit Field Names For Reserved Words	Use the Audit Field Names For Reserved Words screen select the application and files to validate.

Audit Field Names For Reserved Words Screen



Field Definitions

The current data dictionary extension is displayed.

Inquiry

1. Enter the ID of the application to create files for, or leave this field blank to verify all applications for reserved words.

Inquiry

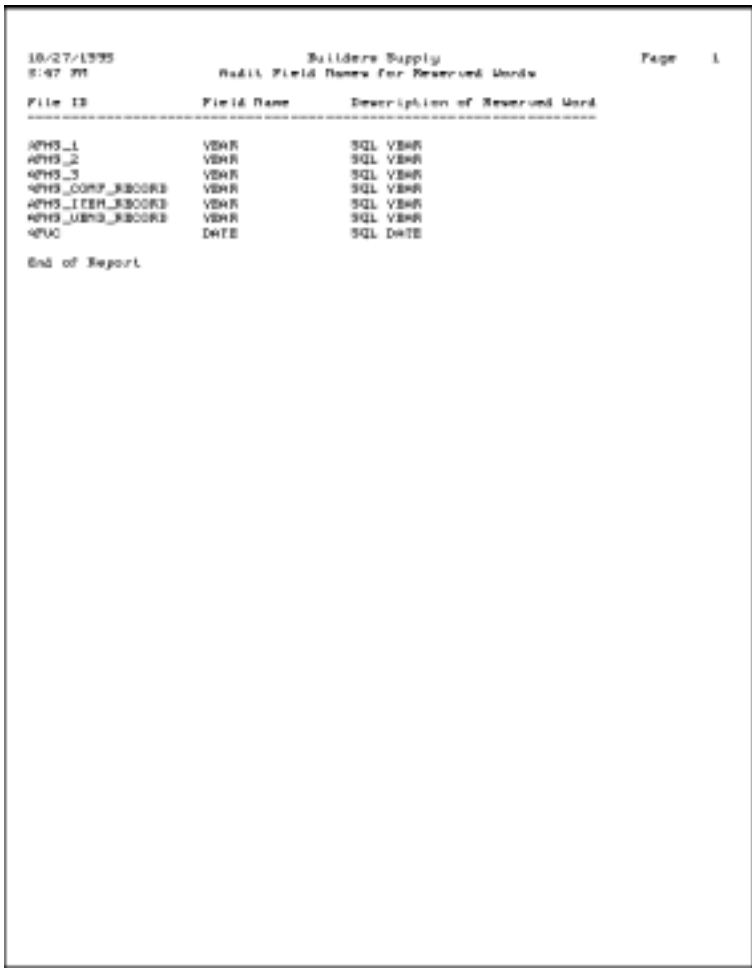
2. Enter the range of file names to verify.

Saving and Exiting

Select the output device to begin printing the report.

After the report is produced, the Dictionary Reports menu appears.

Audit Field Names For Reserved Words List



10/27/1995 Builders Supply Page 1
8:47 PM Audit Field Names for Reserved Words

File ID	Field Name	Description of Reserved Word
APMS_1	VBAR	SQL VBAR
APMS_2	VBAR	SQL VBAR
APMS_3	VBAR	SQL VBAR
APMS_COMP_RECORD	VBAR	SQL VBAR
APMS_ITEM_RECORD	VBAR	SQL VBAR
APMS_UOM_RECORD	VBAR	SQL VBAR
APUC	DATE	SQL DATE

End of Report

Reserved Words List

Features

Use the Reserved Words List function to printout a list of all the reserved SQL words.

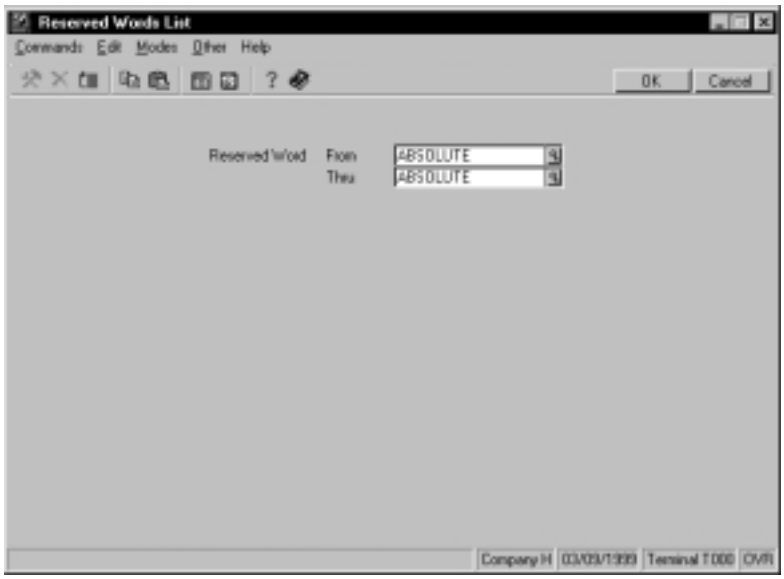
Reports

A sample Reserved Words List is on page 5-15.

Screen Use

Screen	Description
Reserved Words List	Use the Reserved Words List screen to select the reserved words to include in the list.

Reserved Words List Screen



Field Definitions

Inquiry

1. Enter the range of reserved words to include in the list.

Saving and Exiting

Select the output device to begin printing the list.

After the list is produced, the Dictionary Reports menu appears.

Reserved Words List

10/22/1995 Builders Supply Page 1
8:06 PM Reserved Words List

Reserved Word	Description
ABSOLUTE	SQL ABSOLUTE
ACTION	SQL ACTION
ADD	SQL ADD
ALL	SQL ALL
ALLOCATE	SQL ALLOCATE
ALTER	SQL ALTER
AND	SQL AND
ANY	SQL ANY
ARE	SQL ARE
AS	SQL AS
ASC	SQL ASC
ASSERTION	SQL ASSERTION
AT	SQL AT
AUTHORIZATION	SQL AUTHORIZATION
AVG	SQL AVG
BEGIN	SQL BEGIN
BETWEEN	SQL BETWEEN
BOTH	SQL BOTH
BREAK	SQL BREAK
BROWSE	SQL BROWSE
BULK	SQL BULK
BY	SQL BY
CASCADE	SQL CASCADE
CASCADED	SQL CASCADED
CASE	SQL CASE
CAST	SQL CAST
CATALOG	SQL CATALOG
CHARACTER	SQL CHARACTER
CHARACTER_LENGTH	SQL CHARACTER_LENGTH
CHAR_LENGTH	SQL CHAR_LENGTH
CHECK	SQL CHECK
CHECKPOINT	SQL CHECKPOINT
CLOSE	SQL CLOSE
CLUSTERED	SQL CLUSTERED
COALESCE	SQL COALESCE
COLLATE	SQL COLLATE
COLLATION	SQL COLLATION
COLUMN	SQL COLUMN
COMMIT	SQL COMMIT
COMMITTED	SQL COMMITTED
COMPUTE	SQL COMPUTE
CONFIRM	SQL CONFIRM
CONNECT	SQL CONNECT
CONNECTION	SQL CONNECTION
CONSTRAINT	SQL CONSTRAINT
CONSTRAINTS	SQL CONSTRAINTS
CONTINUE	SQL CONTINUE
CONTROLROW	SQL CONTROLROW
CONVERT	SQL CONVERT

Microsoft Access A

This appendix walks you through opening a simple form using the ODBC Kit and Microsoft Access 97. If you require more information about Microsoft Access, consult the Microsoft Access User's Guide or Online Help.

Before you can create this report, complete these tasks:

- Install and set up the ODBC Kit.
- Install and set up the BASIS ODBC drivers.
- Install Microsoft Access 97.

The Microsoft Access example—ACCEXAMP.MDB—which contains two reports and two inquiry forms is included in the ODBC Kit.

You can find additional information about using ODBC with Microsoft Access on the Open Systems web page on the Internet at http:\\www.osas.com.

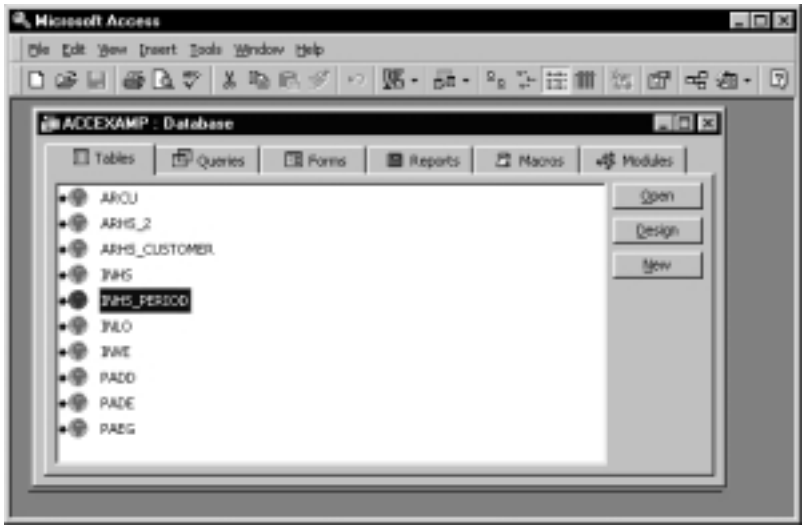
To Work With a Sample Form

1. Start Microsoft Access. If you have security set up, enter your user name and password.

   The Microsoft Access dialog box appears.

2. Select the sample database, ProfitHistory.mdb. Select More Files to locate the database if necessary.

3. The database container is displayed.

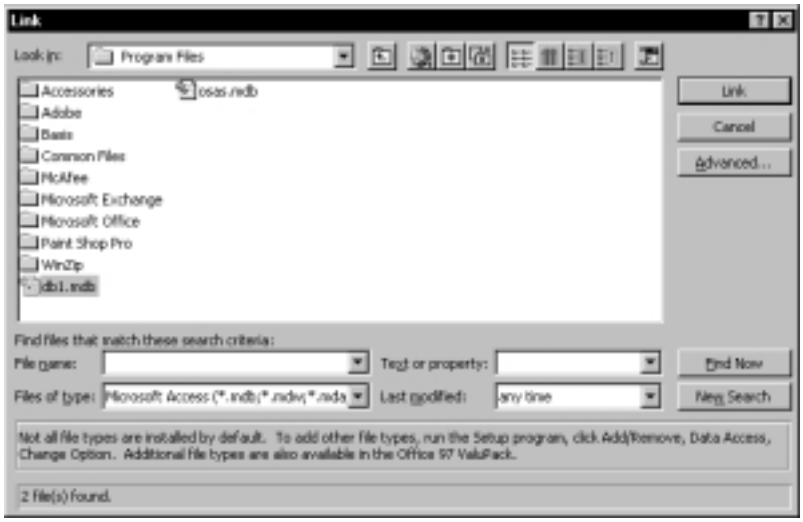


To Link Tables to Microsoft Access

If you encounter problems with the existing table links in the sample data base, delete them and follow these steps:

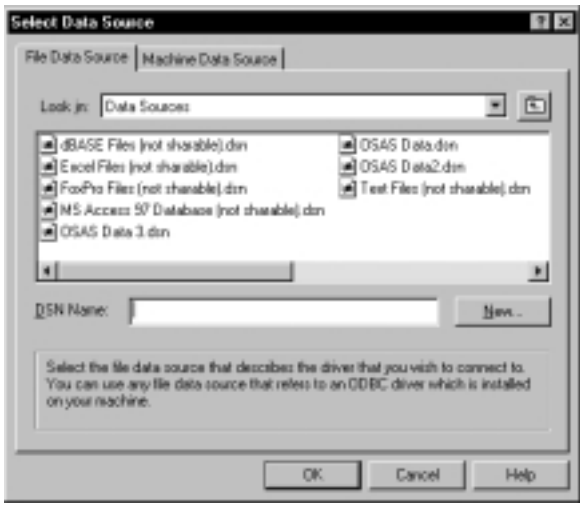
1. Select **Get External Data** and **Link Tables** from the File menu, or right-click the database container and select Link Tables.

The Link dialog box appears.



2. Select ODBC Database in the Files of type field.

The Select Data Source dialog box appears.


Select Data Source
File Data Source
Machine Data Source
Look in:
Data Sources
dBASE Files (not sharable).dsn
Excel Files (not sharable).dsn
FoxPro Files (not sharable).dsn
MS Access 97 Database (not sharable).dsn
OSAS Data 3.dsn
OSAS Data.dsn
OSAS Data2.dsn
Text Files (not sharable).dsn
DSN Name:
New...
Select the file data source that describes the driver that you wish to connect to. You can use any file data source that refers to an ODBC driver which is installed on your machine.
OK
Cancel
Help

3. Select the **Machine Data Source** tab.

   The Machine Data Source tab is displayed.

4. If you have set up an OSAS ODBC machine data source, select it and click **OK**. Otherwise, click **New**.

   Clicking **New** starts a data source creation wizard that will guide you through the process for setting up a new data source. Refer to chapter 2 for instructions on creating a new data source.

The BASIS ODBC Driver Data Source Setup screen appears.

5. Enter a name and description for the data source. Click **Browse** to locate the CONFIG.TPM file you set up using the Edit CONFIG.TPM function in OSAS.

   If you have used the ODBC drivers and already created the shadow dictionaries, click **Advanced**. In the additional fields that are displayed, check the No Shadow Dictionary Consistency Check box and the Fast Connect box to increase the performance of the ODBC drivers.

Note

If you are using OSASCS and you use the data server to access your data, enter your login name in the “Network User ID” field.

6. Click **OK** to connect to the data source.

   The Link Tables screen appears.

7. Select the following tables for the samples in the sample database:

   - ARCU
   - ARHS_2
   - ARHS_CUSTOMER
   - INHS
   - INHS_PERIOD
   - INLO
   - INVE
   - PADD
   - PADE
   - PAEG

8. Select **OK**.

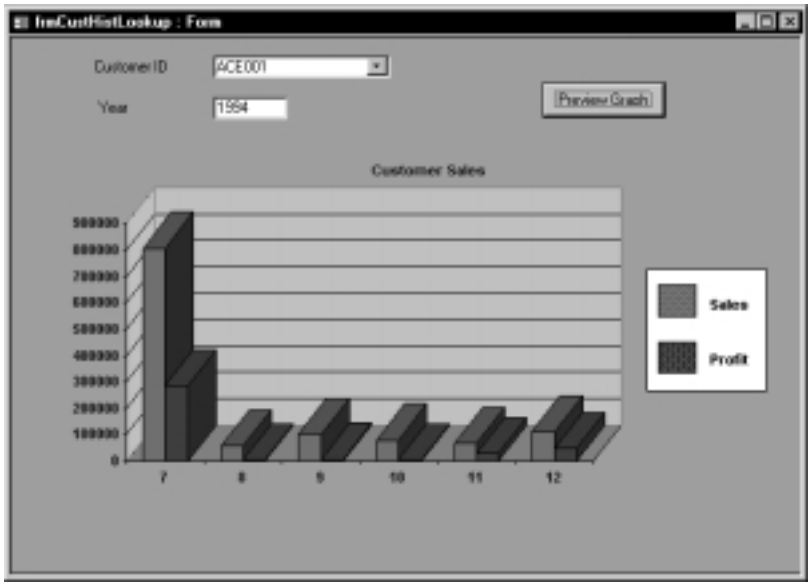
   As the OSAS files are linked to the Microsoft Access database, you are prompted for keyed fields in the OSAS files. Select the keyed fields in the dialog box that are displayed.

You are returned to Microsoft Access. The linked tables are displayed.

9. Select the Forms tab.

10. Select frmCustHistLookup on the Forms tab.

The Customer History Form is displayed.



11. Select a Customer ID and enter a year. Then click **Preview Graph**.

To Work With Sample Queries

To work with sample queries in the Microsoft Access database, select the Queries Tab and select the query you want to work with.

To Work With Sample Reports

To work with sample reports in the Microsoft Access database, select the Reports Tab and select the report you want to work with.

Microsoft Excel B

This appendix walks you through creating a pivot table using the ODBC Kit and Microsoft Excel 97. If you require more information about Microsoft Excel, consult the Microsoft Excel User's Guide or Online Help.

Before you can create this report, complete these tasks:

- Install and set up the ODBC Kit.
- Install and set up the BASIS ODBC drivers.
- Install Microsoft Excel 97 and Microsoft Query 97.

The following Microsoft Excel examples are included in the ODBC Kit:

- GLACCT.XLS—GL Account Number Lookup
- PIVOT.DOC—Microsoft Word instructions for setting up an Excel Pivot table
- SOORDERS.XLS—Sales Orders Pivot Table Lookup
- ARCUST.XLS—Customer History Lookup and Graphs

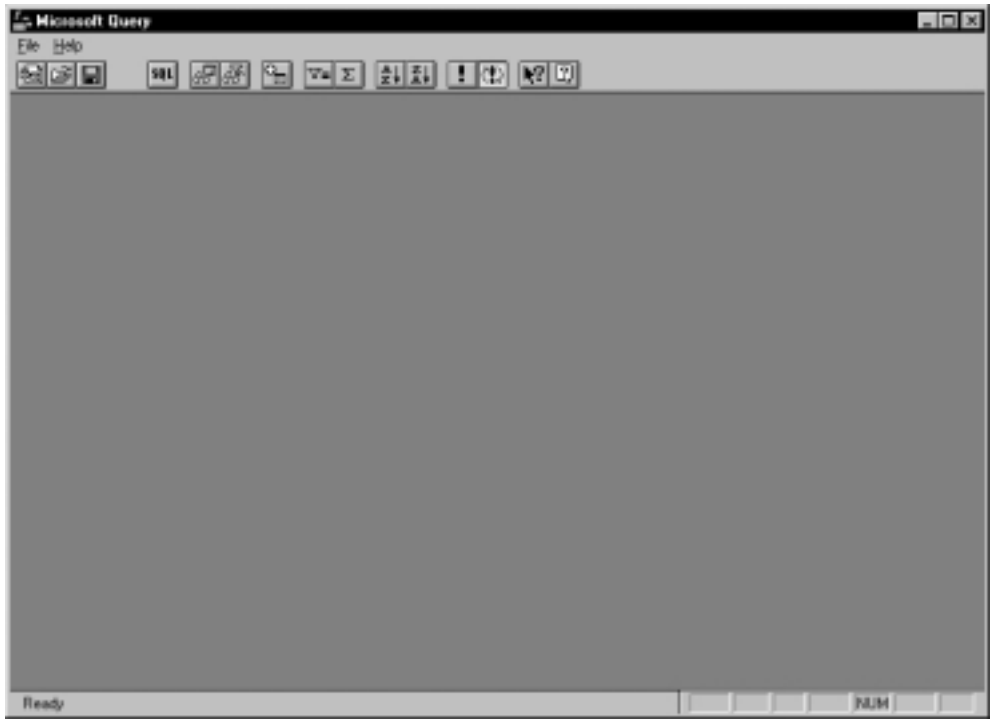
Note

This appendix includes instructions for using Microsoft Query with Microsoft Excel. If necessary, you can install Microsoft Query from the Microsoft Office 97 media. You may also need to create a shortcut to Query manually.

You can find additional information about using ODBC with Microsoft Excel on the Open Systems Web page on the Internet at http:\\www.osas.com.

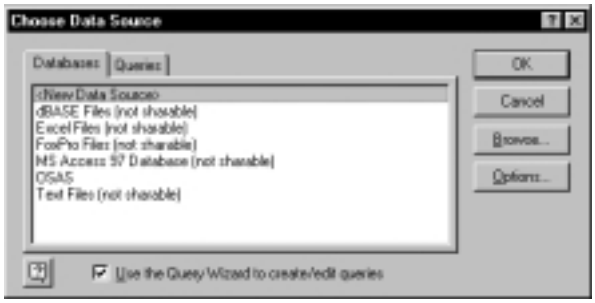
Building a Query For a Pivot Table

1. Start Microsoft Query.



2. Under the **File** menu, select **New**.

The Choose Data Source screen appears.



3. Select **<New Data Source>**, and click **OK**.

   The Create New Data Source screen appears.

4. Enter a name you want to give the data source in field 1. You can use the same source again.

5. Select the **BASIS ODBC Driver** in field 2.

6. Click **Connect**.

The BASIS ODBC Driver Data Source Setup box appears.

7. Enter the file path and name of the CONFIG.TPM file you set up from within the OSAS ODBC software in the Database Configuration field, or select **Browse** and locate the file.

   If you already built the shadow dictionary, click on the **Advanced** button, and check the options for No Shadow Dictionary Consistency Check and Fast Connect to improve performance. See online help for additional information about the options that come with the **Advanced** button.

Note

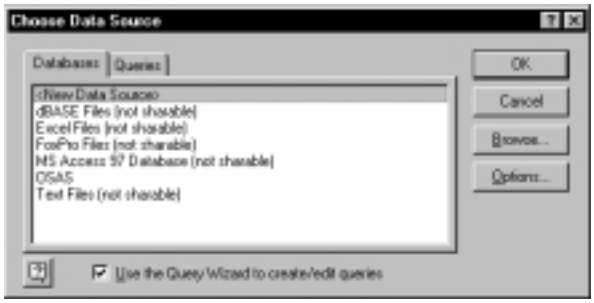
If you are using OSASCS and you use the data server to access your data, enter your login name in the "Network User ID" field.

8. Click **OK** to connect to the data source.

   You are returned to the Create New Data Source screen.

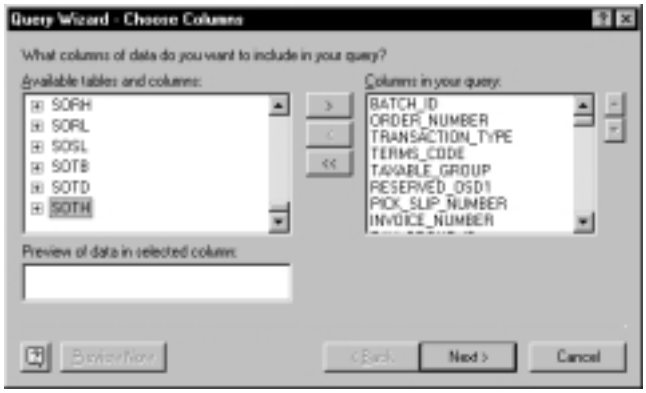
9. Select a table in field 4 if you want to select a default table source; otherwise, leave field 4 blank and select any table when you develop the query. (If you select a table, the list of tables always starts at that table. Otherwise the list of tables starts at the beginning of the list.)

The Choose Data Source box appears.



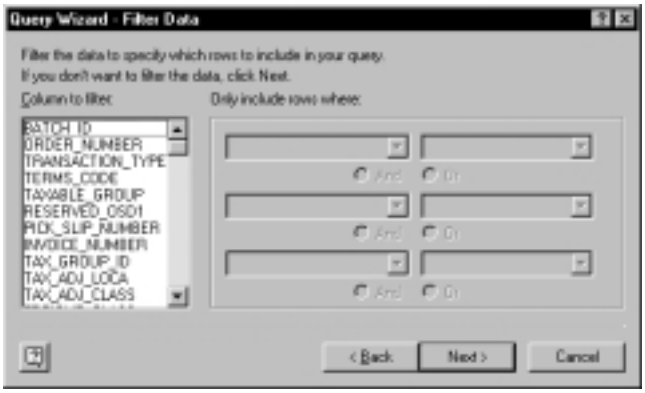
10. Select the data source you set up in the previous steps.

    The Choose Columns screen appears.



11. Select a table you want to use in your Excel spreadsheet. For this example, start with one table and add a second table later. Select the SOTH table, select the columns for the spreadsheet, and click **Next >**.

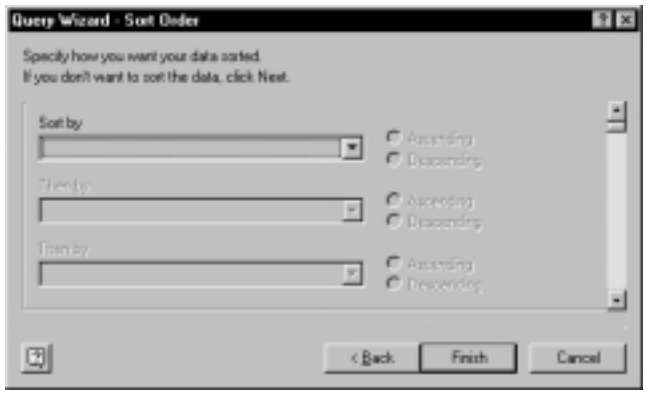
The Filter Data box appears.



Use the Filter Data dialog box to select specific records from the table. In most cases, you do not need to choose anything in the Filter Data dialog box. For example, to filter out credit memos, select the field named TRANSACTION_TYPE, select **does not equal**, and then enter **4** for a value. (TRANSACTION_TYPE 4 is a credit memo.)

12. Click **Next >**.

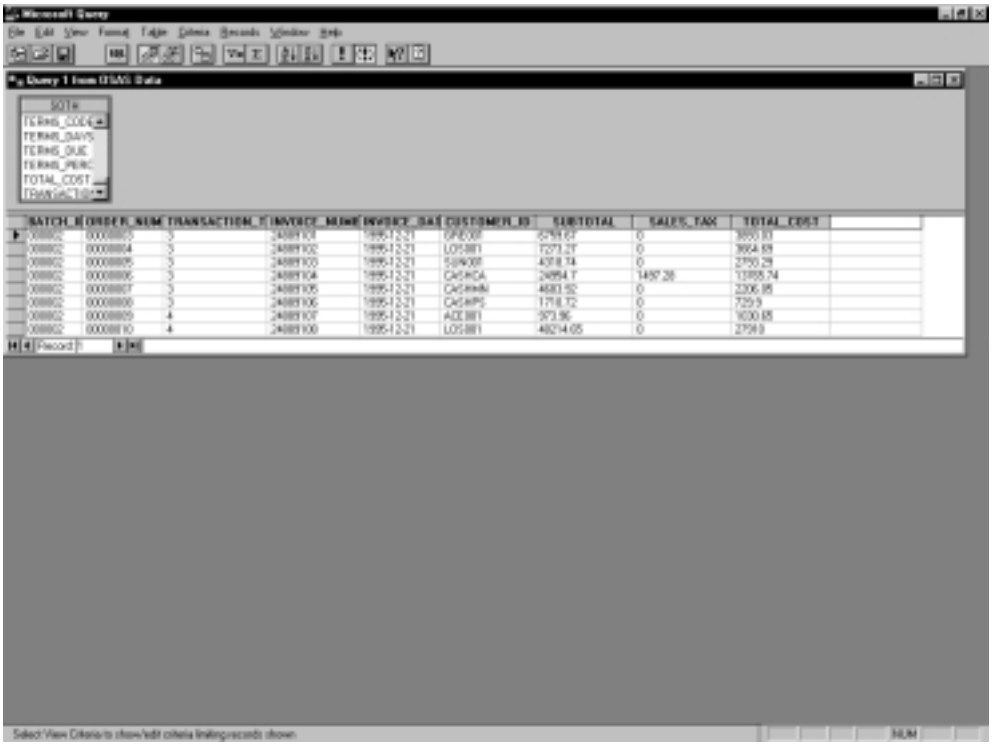
The Sort Order box appears.



Use the Sort Order dialog box to select how the data is sorted in a query. For example, select a field in the Sort by field and check Ascending or Descending for the sort order. Select subsequent fields and sort orders for hierarchical sorts. For now, do not enter any sort fields.

13. Click **Finish**.

    You are returned to the Microsoft Query screen.



The data in your query is displayed. You can delete columns by selecting a column and pressing the **Delete** key. You can also add a column by double-clicking on the field name (in the SOTH file).

NOTE: You can also select which fields you want in your query in the Choose Columns screen as shown on page B-5 above. Instead of selecting the entire table, you can click the + box next to the table you want and select the given fields from the list.

14. Select the following fields:

    - BATCH_ID
    - ORDER_NUMBER
    - TRANSACTION_TYPE
    - INVOICE_NUMBER
    - INVOICE_DATE
    - CUSTOMER_ID
    - SUBTOTAL
    - SALES_TAX
    - TOTAL_COST

15. Select **Table** from the main menu, and choose **Add tables**.

    The Add Table dialog box appears.

16. A list of all the tables is displayed. Select the **SOTD** table, and click **Close**.

Joining Fields

17. Locate BATCH_ID in the SOTD and SOTH tables. Then click and hold the left mouse button down on BATCH_ID in the SOTH table

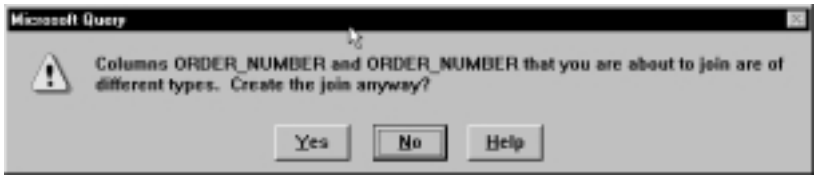
18. Drag the field over to the **BATCH_ID** field in the SOTD table and release the mouse button.

    A line appears between the two BATCH_ID fields, joining the two fields.

19. Follow steps 17 through 18 with the ORDER_NUMBER field.

Note

You may get the message shown below. For now, click **Yes** to ignore the message and join the fields together.


Microsoft Query
Columns ORDER_NUMBER and ORDER_NUMBER that you are about to join are of different types. Create the join anyway?
Yes
No
Help

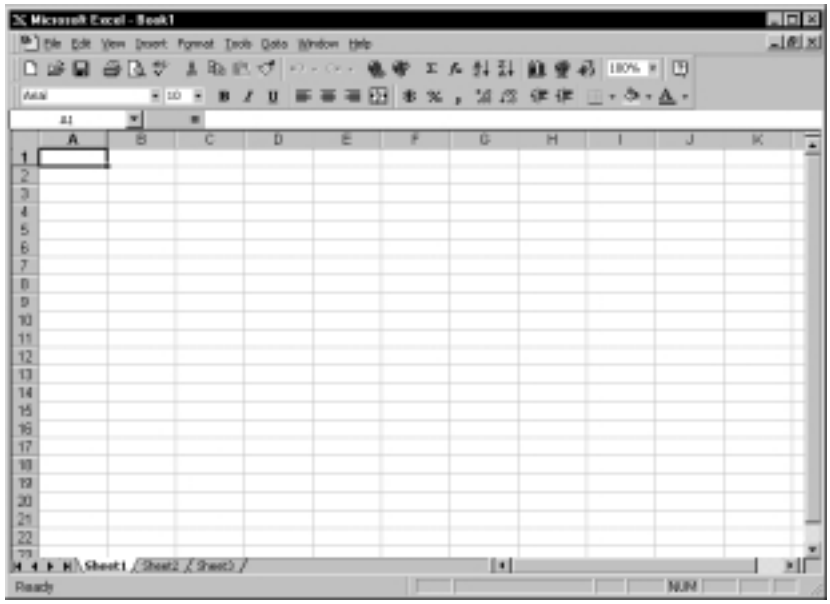
20. Select the following fields from the SOTD table:

    - ENTRY_NUMBER
    - UNIT_COST_COMPNT
    - UNIT_PRICE
    - ORDERED_QTY
    - SHIPPED_QTY_SELL
    - BACKORDERED_QTY.

21. Select **Save** from the **File** menu to save the query.

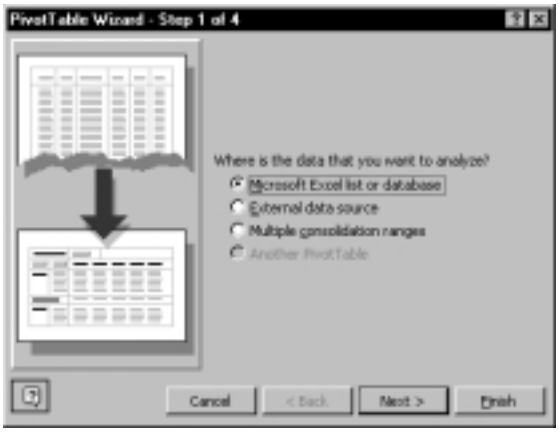
Using the Query in Microsoft Excel

1. Start Excel and open a new worksheet.



2. Select the **Data** menu. Then select **Pivot Table Report**.

The Pivot Table Wizard appears.

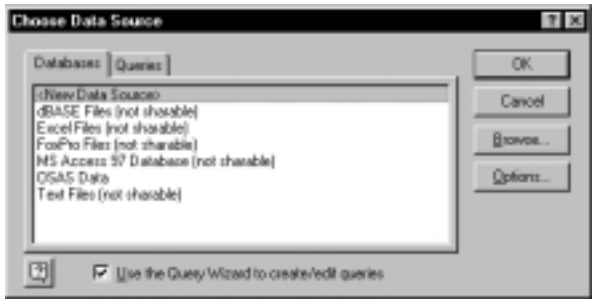


3. In step 1 of the Wizard, a list of options is displayed where you can choose the data source to be used in your Pivot Table. Select **External Data Source**, and click **Next** >.

   The Pivot Table Wizard - Step 2 of 4 dialog box appears.

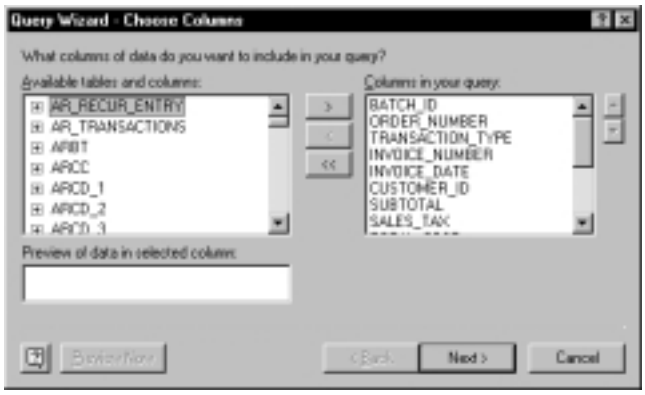
4. In step 2 of the Wizard, click **Get Data**.

The Choose Data Source box from Microsoft Query appears.



5. Click the **Queries** tab, and select the query you saved under Microsoft Query.

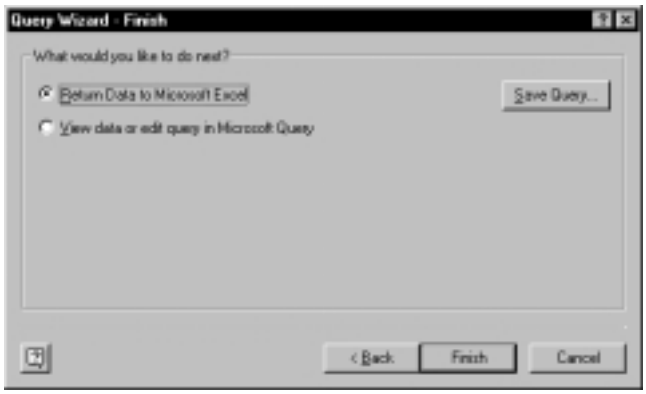
The Choose Columns box under Query appears.



6. Click **Next >**. The query columns are displayed.

7. Click **Next >** to pass by **Filter Data** and **Sort Order** options.

   The Query Wizard - Finish dialog box appears.

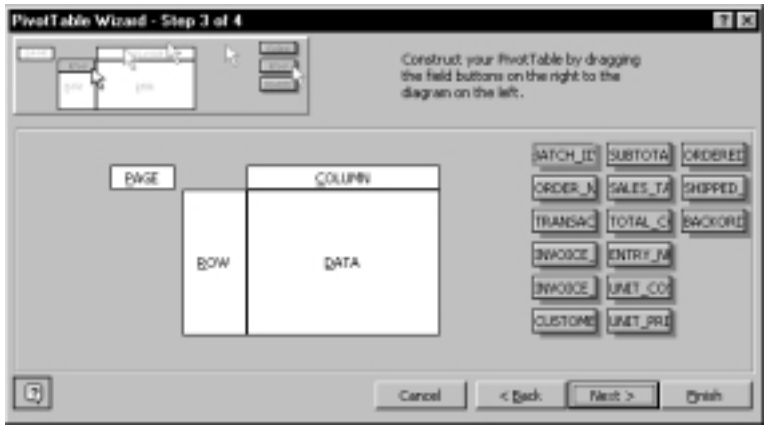


8. Select **Return Data to Microsoft Excel,** and click **Finish**.

   You are returned to the Pivot Table Wizard Step 2 of 4 dialog box.

9. Click **Next >**.

The Pivot Table Wizard - Step 3 of 4 dialog box appears.

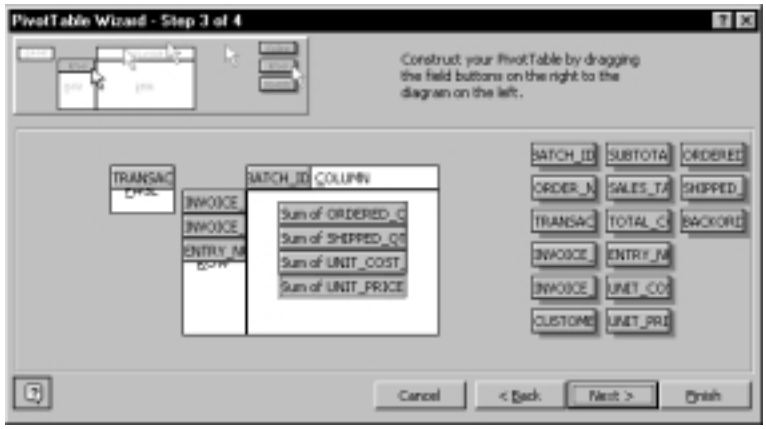


The selected fields and four areas—**Page**, **Row**, **Column**, and **Data**—to put fields are displayed. Drag and drop the fields to use in this report into the respective areas. (To display the full field name, hold the cursor on the button, and a tool tip displays the full field name.)

10. Drag and drop the following fields:

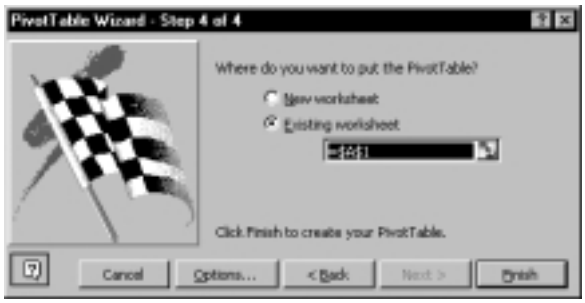
    - TRANSACTION_TYPE into **PAGE**
    - INVOICE_NUMBER, INVOICE_DATE, and ENTRY_NUM into **ROW**
    - BATCH_ID into **COLUMN**
    - ORDERED_QTY, SHIPPED_QTY_SELL, UNIT_COST_COMPNT and UNIT_PRICE into **DATA**.

The fields are displayed on the screen. Numeric fields dropped into the Data section become summary fields.


PivotTable Wizard - Step 3 of 4
Construct your PivotTable by dragging the field buttons on the right to the diagram on the left.
COLUMN
Sum of ORDERED_Q
Sum of SHIPPED_QT
Sum of UNIT_COST
Sum of UNIT_PRICE
Cancel
< Back
Next >
Finish

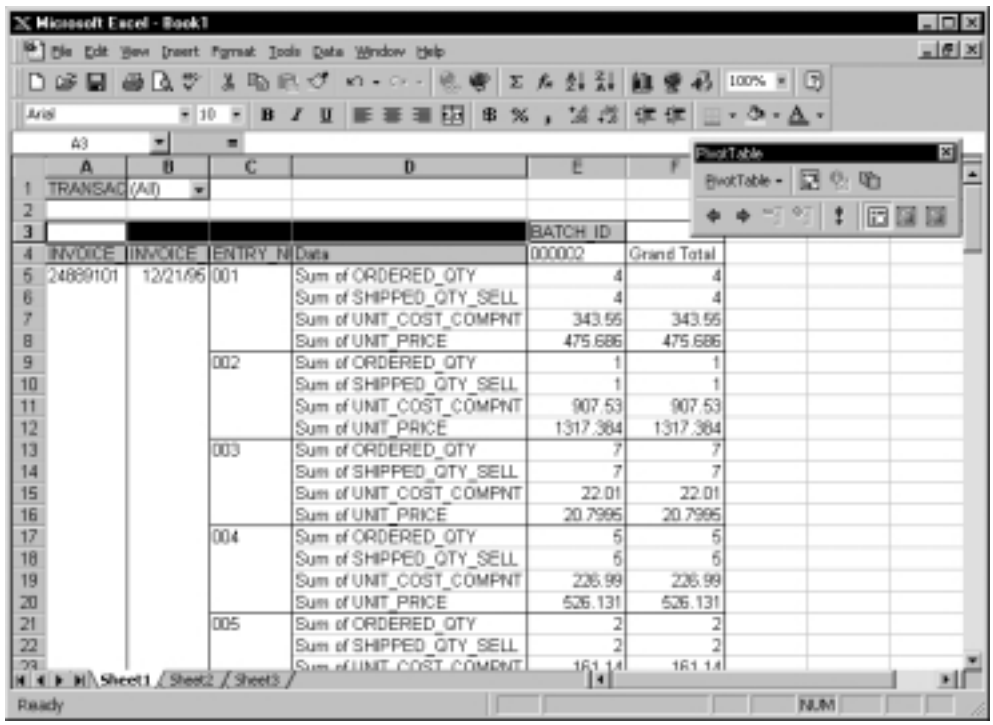
11. Click **Next >**.

    The Pivot Table Wizard - Step 4 of 4 dialog box appears.



12. The last step lets you create the pivot table either in the existing worksheet or in a different worksheet. Accept the given options and click **Finish**.

The pivot table is displayed.



	A	B	C	D	E	F
1	TRANSAC	(All)				
2						
3					BATCH_ID	
4	INVOICE	INVOICE	ENTRY_N	Data	000002	Grand Total
5	24889101	12/21/96	001	Sum of ORDERED_QTY	4	4
6				Sum of SHIPPED_QTY_SELL	4	4
7				Sum of UNIT_COST_COMPNT	343.55	343.55
8				Sum of UNIT_PRICE	475.686	475.686
9			002	Sum of ORDERED_QTY	1	1
10				Sum of SHIPPED_QTY_SELL	1	1
11				Sum of UNIT_COST_COMPNT	907.53	907.53
12				Sum of UNIT_PRICE	1317.384	1317.384
13			003	Sum of ORDERED_QTY	7	7
14				Sum of SHIPPED_QTY_SELL	7	7
15				Sum of UNIT_COST_COMPNT	22.01	22.01
16				Sum of UNIT_PRICE	20.7995	20.7995
17			004	Sum of ORDERED_QTY	5	5
18				Sum of SHIPPED_QTY_SELL	5	5
19				Sum of UNIT_COST_COMPNT	226.99	226.99
20				Sum of UNIT_PRICE	526.131	526.131
21			005	Sum of ORDERED_QTY	2	2
22				Sum of SHIPPED_QTY_SELL	2	2
23				Sum of UNIT_COST_COMPNT	161.14	161.14

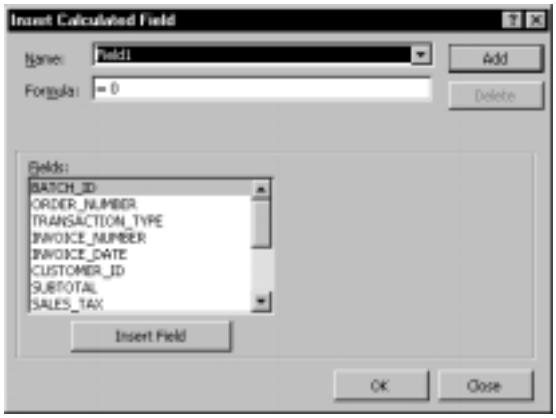
Highlight rows and columns to shift them around. To display only invoices, change Transaction Type from **All** to **3** . Change it to **4** and credit memos are displayed. Totals per type are also displayed.

Adding a Calculated Field

You can also add new fields, like profit, to the data area. To add profit to the data area, follow these steps:

1. Highlight the last row in your data area, **Sum of UNIT_PRICE**, right-click, and select **Insert**.

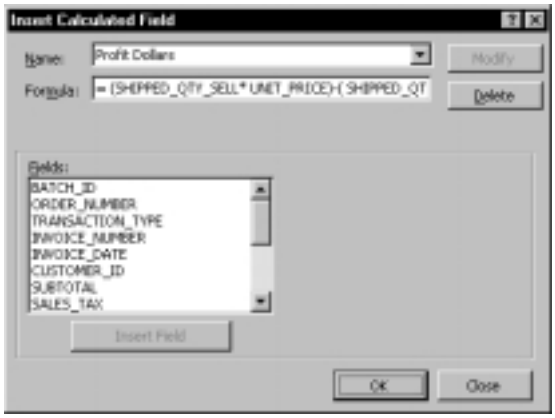
The Insert Calculated Field dialog box appears.



2. Enter the following information about the inserted field:

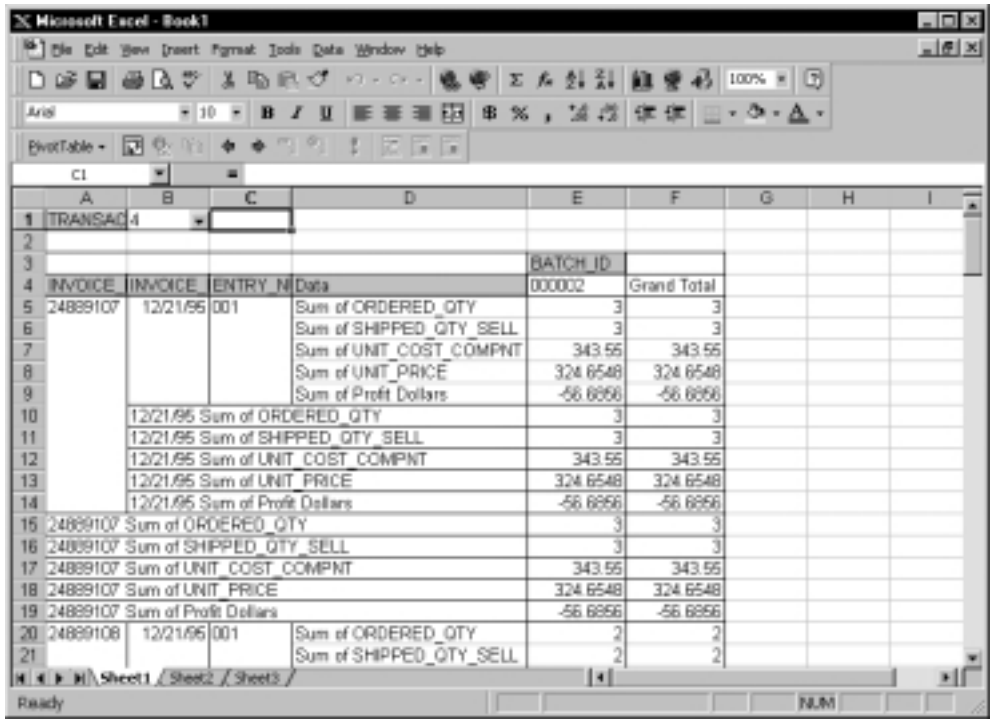
   - Enter **Profit Dollars** in the Name field.
   - Enter **=(SHIPPED_QTY_SELL* UNIT_PRICE) - (SHIPPED_QTY_SELL* UNIT_COST_COMPNT)** in the Formula field.

3. Click **Add**.



4. Click **OK**.

The pivot table is displayed with the Sum of Profit Dollars field.



	A	B	C	D	E	F	G	H	I
1	TRANSAC	4							
2									
3					BATCH_ID				
4	INVOICE_	INVOICE_	ENTRY_N	Data	000002	Grand Total			
5	24889107	12/21/95	001	Sum of ORDERED_QTY	3	3			
6				Sum of SHIPPED_QTY_SELL	3	3			
7				Sum of UNIT_COST_COMPNT	343.55	343.55			
8				Sum of UNIT_PRICE	324.6548	324.6548			
9				Sum of Profit Dollars	-56.6956	-56.6956			
10		12/21/95 Sum of ORDERED_QTY			3	3			
11		12/21/95 Sum of SHIPPED_QTY_SELL			3	3			
12		12/21/95 Sum of UNIT_COST_COMPNT			343.55	343.55			
13		12/21/95 Sum of UNIT_PRICE			324.6548	324.6548			
14		12/21/95 Sum of Profit Dollars			-56.6956	-56.6956			
15	24889107 Sum of ORDERED_QTY				3	3			
16	24889107 Sum of SHIPPED_QTY_SELL				3	3			
17	24889107 Sum of UNIT_COST_COMPNT				343.55	343.55			
18	24889107 Sum of UNIT_PRICE				324.6548	324.6548			
19	24889107 Sum of Profit Dollars				-56.6956	-56.6956			
20	24889108	12/21/95	001	Sum of ORDERED_QTY	2	2			
21				Sum of SHIPPED_QTY_SELL	2	2			

For more information about pivot tables, see the Microsoft Excel Documentation or Online Help.

Microsoft Query C

This appendix walks you through creating a query using the ODBC Kit and Microsoft Query 97. If you require more information about Microsoft Query, consult the Microsoft Query User's Guide or Online Help.

Before you create this report, complete these tasks:

- Install and set up the ODBC Kit.
- Install and set up the BASIS ODBC drivers.
- Install Microsoft Query 97.

Information about using Microsoft Query is contained in Appendixes B and D. See those appendixes for specific examples.

Microsoft Word D

This appendix walks you through creating a dunning letter using the ODBC Kit, Microsoft Query 97, and Microsoft Word 97. If you require more information about Microsoft Word, consult the Microsoft Word User's Guide or Online Help.

Before you create this form letter, complete these tasks:

- Install and set up the ODBC Kit.
- Install and set up the BASIS ODBC drivers.
- Install Microsoft Query 97 and Microsoft Word 97.

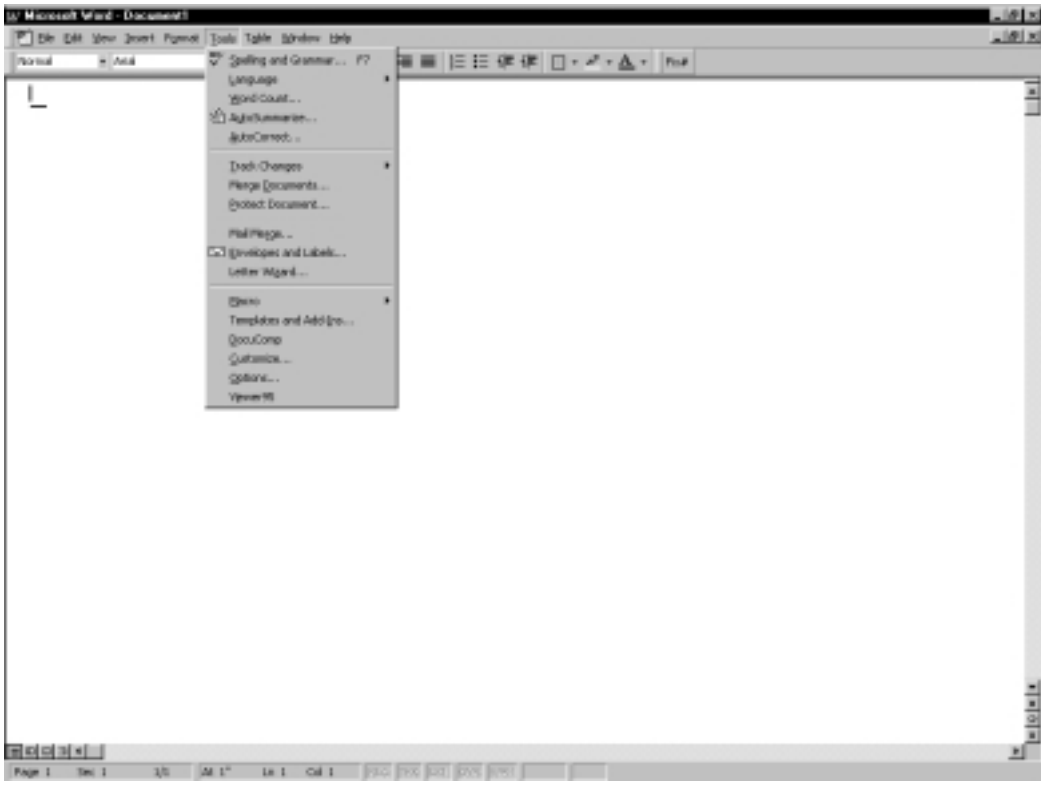
Note

This appendix includes instructions for using Microsoft Query with Microsoft Word. If necessary, you can install Microsoft Query from the Microsoft Office 97 media. You may also need to create a shortcut to Query manually.

To create a form letter, create a query for the form letter, and merge the letter and query, follow these steps:

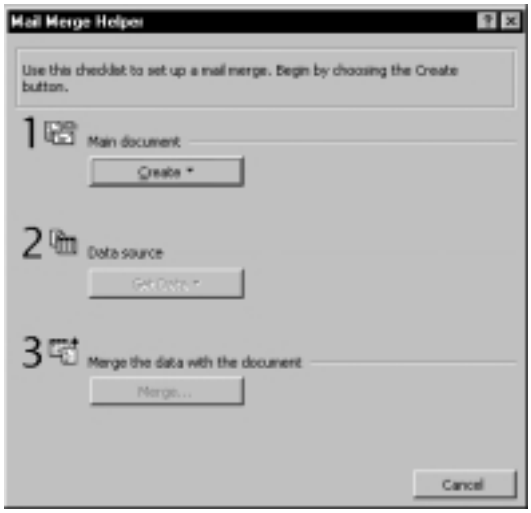
1. Start Microsoft Word.

The Word main screen appears.



2. Select **Mail Merge** from the **Tools** menu.

The Mail Merge Helper dialog box appears.



3. Select **Create**.

4. Select **Form Letter** from the **Create** options.

   A Microsoft Word message box appears.

Microsoft Word
To create the form letters, you can use the active document window Document1 or a new document window.
Active Window
New Main Document

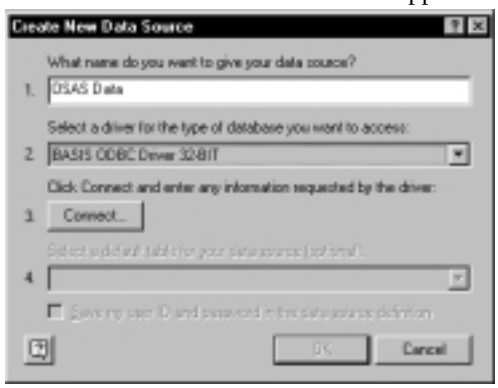
5. Select **Active Window**. You are returned to the Mail Merge Helper dialog box. The **Edit** button appears. Use it to edit or enter text in the document.

6. Select **Get Data** to connect to the OSAS data. If you have defined a query, select **Open Data Source** and select the query in the dialog box that appears. If you have not defined a query, select **Create Data Source**.

The Choose Data Source screen appears.

7. Select **<New Data Source>**, and click **OK**.

   The Create New Data Source screen appears.



8. Enter a name you want to give the data source in field 1. You can use the same source again.

9. Select the **BASIS ODBC Driver** in field 2.

10. Click **Connect**.

The BASIS ODBC Driver Data Source Setup box appears.

11. Enter the file path and name of the CONFIG.TPM file you set up using the Edit CONFIG.TPM function in the Database Configuration field, or select **Browse** and locate the file.

    If you have already built the shadow dictionary, click on the **Advanced** button, and check the options for No Shadow Dictionary Consistency Check and Fast Connect to improve performance. See online help for additional information about the options that come with the **Advanced** button.

Note

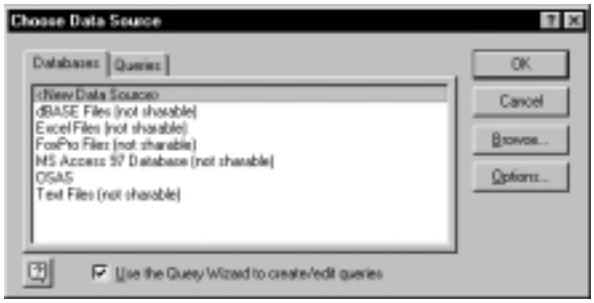
If you are using OSAS C/S and you use the data server to access your data, enter your login name in the "Network User ID" field.

12. Click **OK** to connect to the data source.

    You are returned to the Create New Data Source screen.

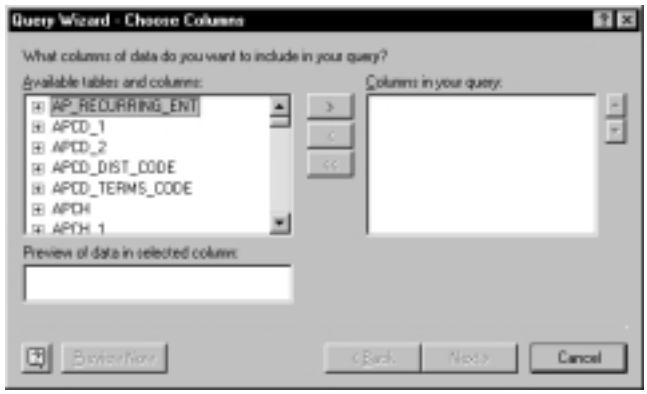
13. Select a table in field 4 if you want to select a default table source. Otherwise, leave field 4 blank and select any table when you develop the query. (If you select a table, the list always starts at that table; otherwise the list starts at the first table.)

The Choose Data Source box appears.



14. Select the data source you set up in the previous steps.

    The Choose Columns screen appears.



15. Select the tables you want to use in your Word form letter. For this example, select ARCU.

16. Select the following fields:

    - CUSTOMER_ID
    - CUSTOMER_NAME
    - ADDRESS_LINE_1
    - ADDRESS_LINE_2

- ADDRESS_LINE_3
- CITY
- STATE
- ZIP_CODE
- ATTENTION
- BALANCE_31_60
- BALANCE_61_90
- BALANCE_91_120
- UNAPPLIED_CREDIT

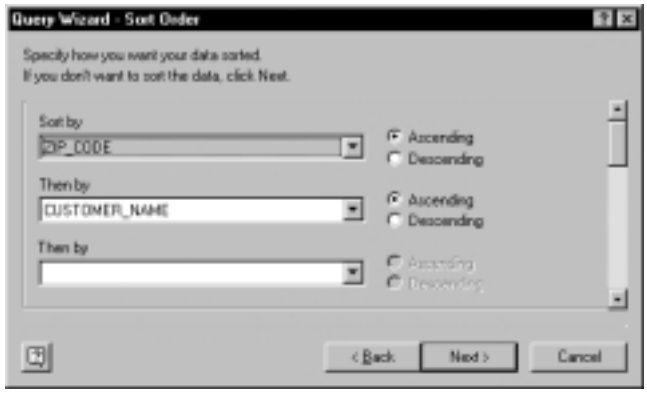
17. Click **Next >**.

    The Filter Data box appears.

18. Use the Filter Data dialog box to select specific records from the table. Select the BALANCE_31_60 field, select **is greater than**, and select **0**. The query will return only those customers whose BALANCE_31_60 field is greater than 0.

19. Click **Next >**.

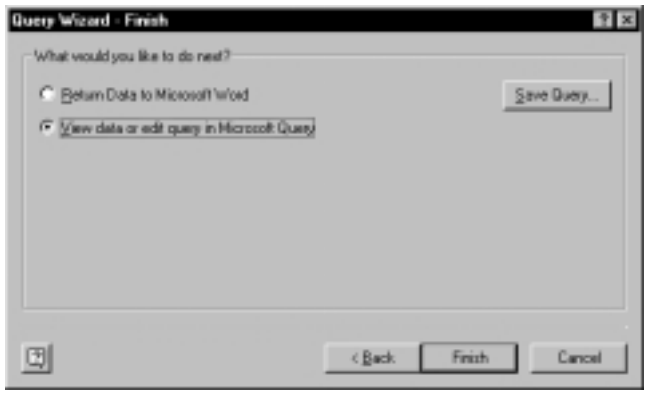
The Sort Order box appears.



20. Select ZIP_CODE in the Sort by field, and check Ascending as the sort order. Select CUSTOMER_NAME in the first Then by field, and check Ascending as the sort order. The results of the query will sort first by the customer's zip code and then by the customer's name.

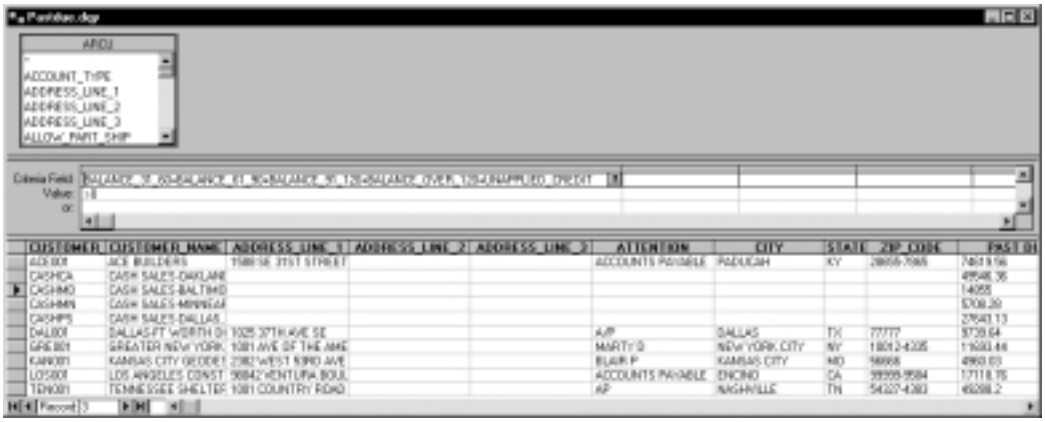
21. Click **Next >**.

    The Query Wizard - Finish dialog box appears.



22. Select **View data or edit query** in Microsoft Query**,** and click **Finish**.

You are returned to Microsoft Query.



23. Enter the following in the Criteria Field:

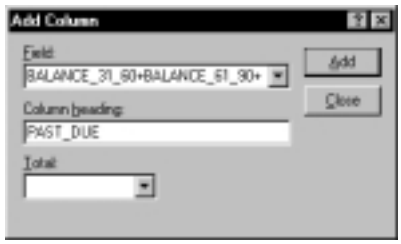
    BALANCE_31_60+BALANCE_61_90+BALANCE_91_120+

    BALANCE_OVER_120+UNAPPLIED_CREDIT

24. Select the fields in the Criteria Field and copy them to the clipboard (Ctrl-C).

25. Select **Add Column** from the **Records** menu.

    The Add Column dialog box appears.



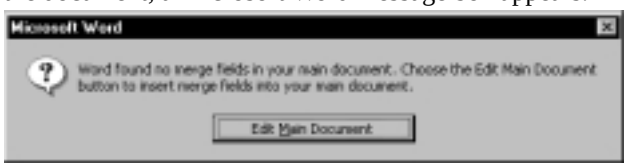
26. Paste the clipboard Criteria Fields into Field. Enter PAST_DUE in the Column heading field. Click **Add** and then click **Close**.

27. You are returned to Microsoft Query. The PAST_DUE column is added to the query.

28. Select **Save** from the **File** menu to save the query.

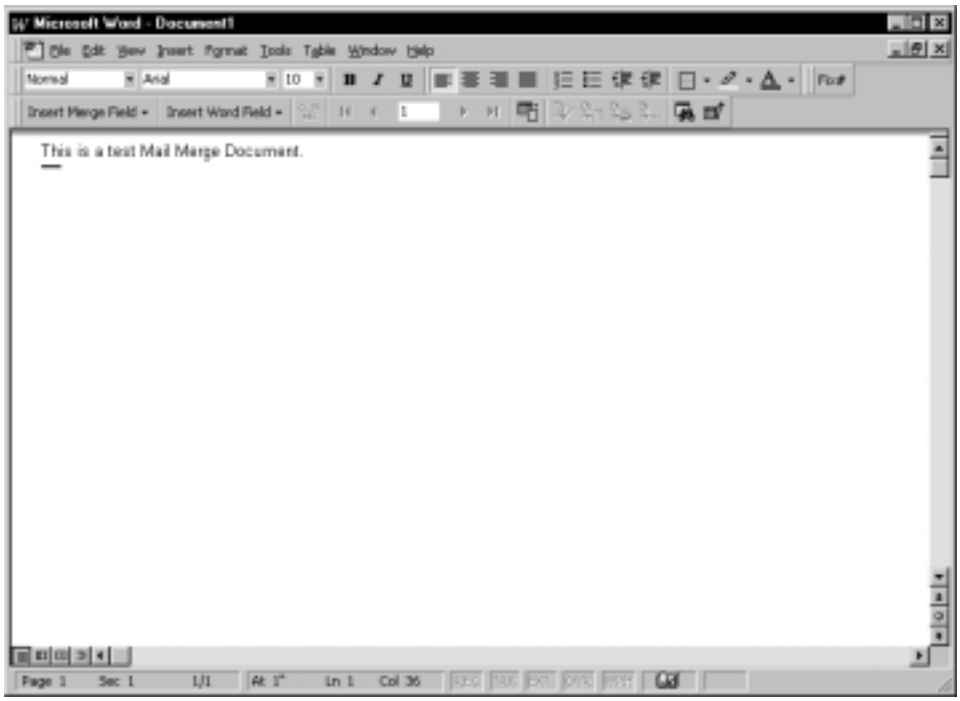
29. Select **Return Data to Microsoft Word** from the **File** menu.

    You are returned to Microsoft Word. If you have no merge fields defined in the document, a Microsoft Word message box appears.


Microsoft Word
Word found no merge fields in your main document. Choose the Edit Main Document button to insert merge fields into your main document.
Edit Main Document

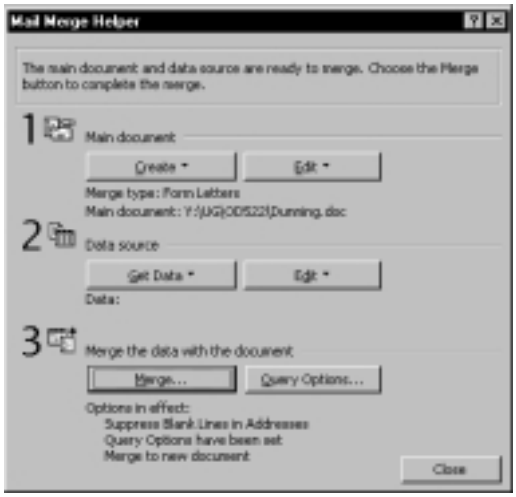
30. Select **Edit Main Document**.

    The Mail Merge Helper dialog box closes and you are returned to the document.


Microsoft Word - Document1
File Edit View Insert Format Tools Table Window Help
Insert Merge Field
Insert Word Field
This is a test Mail Merge Document.

31. Use the **Insert Merge Field** button to insert the fields (such as the CUSTOMER_NAME) from the query into the form letter. Use the **Insert Word Field** button to insert Word fields (such as the current date) into the form letter. When you are finished with the letter, select **Mail Merge** from the **Tools** menu.

32. The Mail Merge Helper dialog box appears.

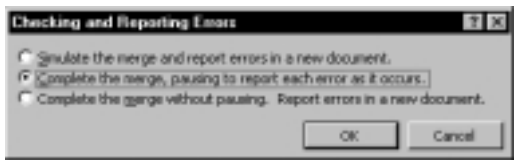


33. Select **Merge** to create the form letters.

34. The Merge dialog box appears.

35. Select the merge options: New document, Printer, or Electronic mail. Select **Check Errors** if you want to proof the interaction between Microsoft Word and the query. Otherwise, select **Merge** to produce the letters.

36. If you select Check Errors, the Checking and Reporting Errors dialog box appears.


Checking and Reporting Errors
Simulate the merge and report errors in a new document.
Complete the merge, pausing to report each error as it occurs.
Complete the merge without pausing. Report errors in a new document.
OK
Cancel

37. Select the option, and click **OK**.

38. You are returned to Microsoft Word.

Microsoft Word - Builder.doc
File Edit View Insert Format Tools Table Window Help
Normal Helvetica 16
Builder's Supply
7626 Golden Triangle Drive
Eden Prairie, MN 55344-3732
AP
TENNESSEE SHELTERS, INC.
1001 COUNTRY ROAD
NASHVILLE TN 54327-4383
3 November, 1997
Dear AP,
Our records indicate that a balance of $49288.20 is outstanding and past due on your account. Please remit this amount immediately, or call our offices at (612)555-0011 to make other arrangements at your earliest convenience.
If you have already sent payment, please accept our apologies for this letter.
Sincerely,
Carol Johnson
Account Collection Dept.
Builders' Supply, Inc.
Page 1 Sec 1 1/4 At 1" Ln 1 Col 1

Note

The form letter does not format decimal numbers that end in 0 correctly. For example, $49288.20 is produced as $49288.2.

Sample Word Form Letter

```
Builder's Supply
7626 Golden Triangle Drive
Eden Prairie, MN 55344-3732

{MERGEFIELD ATTENTION}
{MERGEFIELD CUSTOMER NAME}
{MERGEFIELD ADDRESS_LINE_1}
{MERGEFIELD ADDRESS_LINE_2}
{MERGEFIELD ADDRESS_LINE_3}
{MERGEFIELD CITY}{MERGEFIELD STATE}{MERGEFIELD ZIP_CODE}
{time\@ "D mmmm, yyyy"}

Dear {MERGEFIELD ATTENTION},
Our records indicate that a balance of ${MERGEFIELD PAST_DUE} is outstanding and past due on
your account. Please remit this amount immediately, or call our offices at (612) 555-0011 to
make other arrangements at your earliest convenience.
If you have already sent payment, please accept our apologies for this letter.

Sincerely,

Carol Johnson
Account Collection Dept.
Builders' Supply, Inc.

CRJ/fsd
```

Crystal Reports E

This appendix walks you through creating a simple report using the ODBC Kit and Crystal Reports for Windows. If you require more information about Crystal Reports, consult the Crystal Reports User's Guide or Online Help.

Before you create this report, complete these tasks:

- Install and set up the ODBC Kit.
- Install and set up the BASIS ODBC drivers.
- Install Seagate Crystal Reports for Windows.

The following Crystal Reports examples are included:

- ARLABEL.RPT—Customer Labels
- CRYSTAL.DOC—Microsoft Word instructions for setting up the customer list in Crystal Reports
- ARCUST1.RPT— Customer List
- ARCUST2.RPT—Customer List with Graph
- BRRECON.RPT—Bank Reconciliation Reconciliation Report

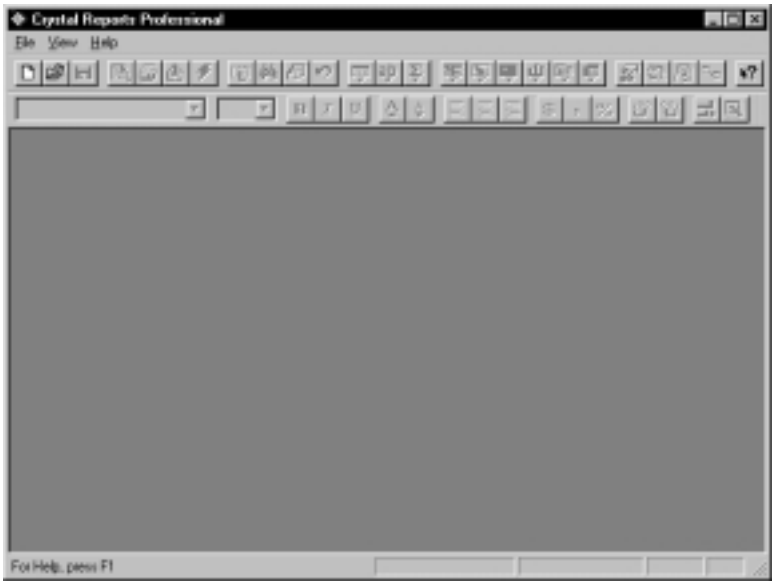
You can find additional information about using ODBC with Crystal Reports on the Open Systems Web page on the Internet at http:\\www.osas.com.

Crystal Reports Customer List

To create a customer list using Crystal Reports for Windows, follow these steps:

1. Start Crystal Reports.

   The Crystal Reports screen appears.

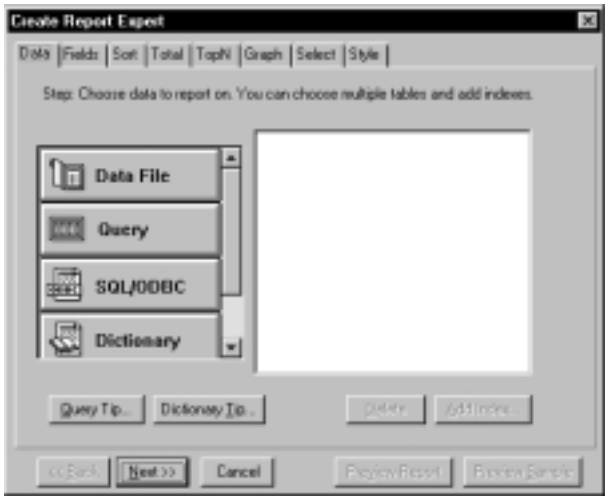


2. Select **New** from the **File** menu.

   The Report Gallery screen appears.

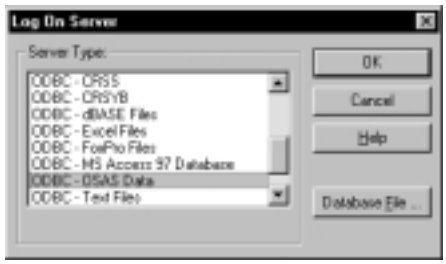
3. Select **Standard** report format.

   The Create Report Expert screen appears.



4. Select **SQL/ODBC** as your source on the **Data** tab.

   The **Log On Server** dialog box appears.



5. Select the data source you set up for OSAS ODBC data under the Windows ODBC Administrator.

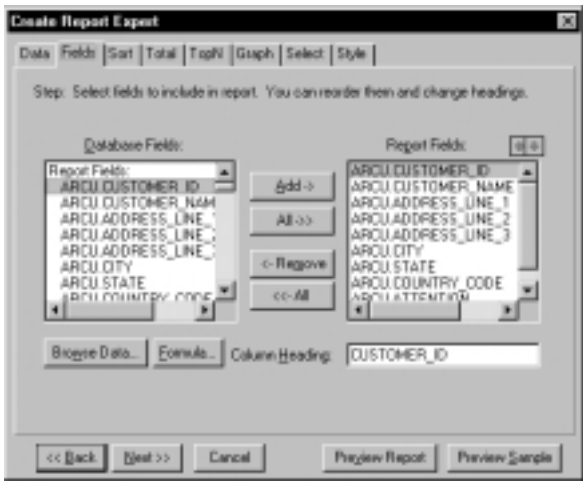
The Choose SQL Table dialog box appears.

6. Select the **ARCU** file, click **Add**, and then click **Done**.

   You are returned to the Create Report Expert screen.

7. Select the **Fields** tab or click **Next >>**.

   The Fields tab appears.

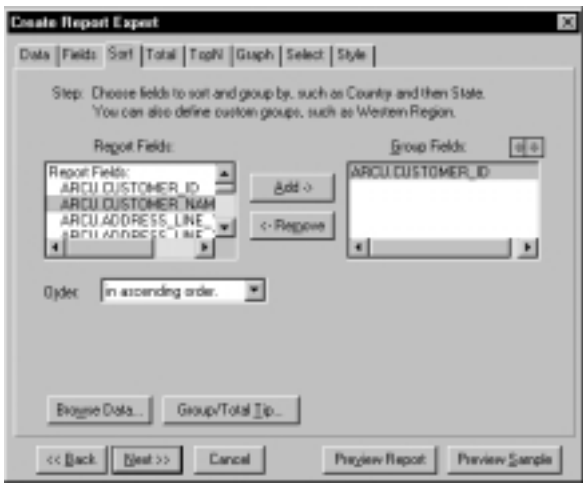


8. Select the following fields for the report:

- CUSTOMER_ID
- CUSTOMER_NAME
- ADDRESS_LINE_1
- ADDRESS_LINE_2
- ADDRESS_LINE_3
- CITY
- STATE
- COUNTRY_CODE
- ATTENTION

9. Select the **Sort** tab or click **Next >>**.

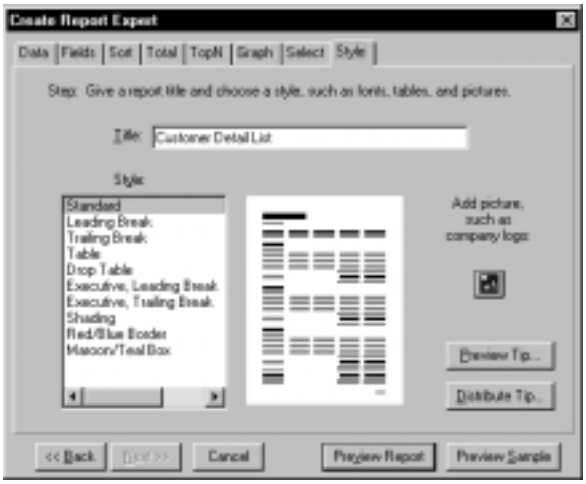
   The Sort tab appears.



10. Select **CUSTOMER_ID** to sort the report by.

11. Select the **Style** tab.

The Style tab appears.

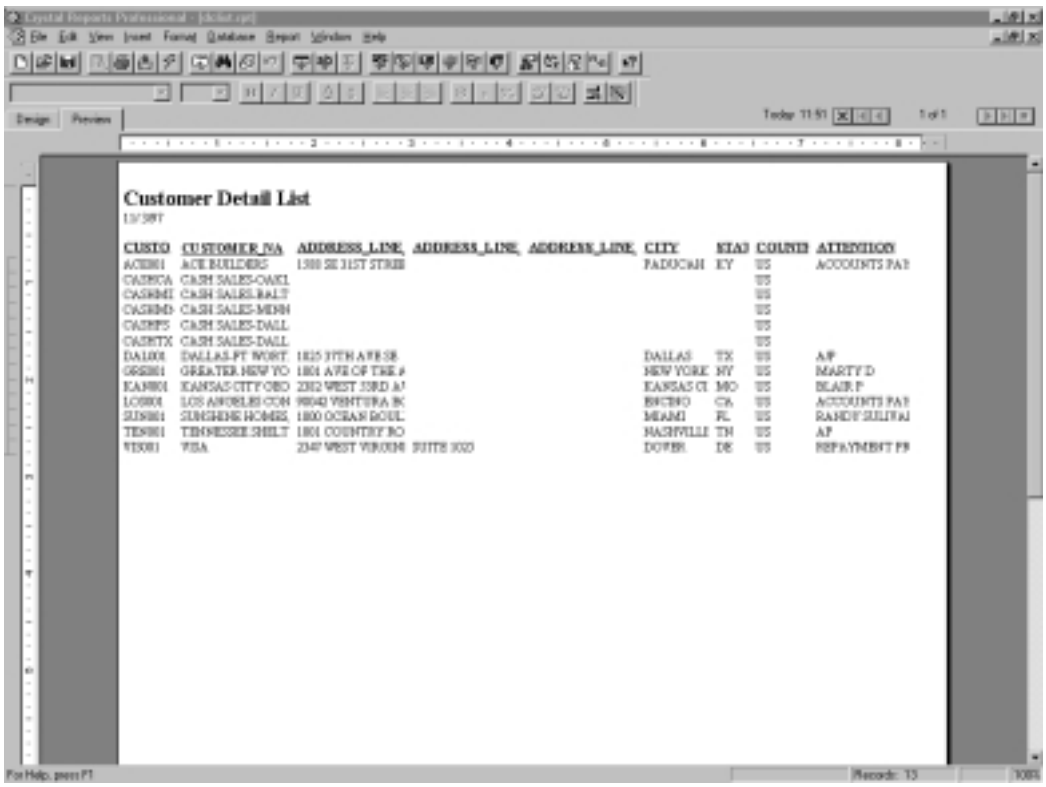


12. Enter **Customer Detail List** for the title.

13. Select **Standard** for the report style.

14. Select **Preview Report**.

The report is displayed.



The example report included with the OSAS ODBC package resembles the AR Customer Detail List. You can move the fields by dragging and dropping them. (Column titles on the sample report have been deleted.)

To insert text fields on the report, follow these steps:

1. Select **Text Object** under the **Insert** menu to add text fields.

2. Move the cursor to where you want to add text to the report.

3. Type in the text.

Common Questions F

These are commonly asked questions about the ODBC Kit.

I get a message that my Shadow Dictionaries are not being built.

Use the Build Shadow Dictionary function on the Dictionary Tools menu to re-create the shadow dictionary. Then, click the Advanced settings on the ODBC data source, and check Fast Connect and No Shadow Dictionary Consistency Check to speed up data connections and to prevent the ODBC driver from rebuilding the shadow dictionaries when you start the driver

It takes a long time to build the shadow dictionary, and it does it every time I connect to the ODBC Driver.

If you do not check the Fast Connect and No Shadow Dictionary Consistency Check options in the Advanced Settings on the ODBC data source, the shadow dictionary will be rebuilt every time you start an ODBC connection. Changing these option settings will speed up data connections and prevent the ODBC driver from rebuilding the shadow dictionaries when you start the driver.

I get a message that the user count is exceeded.

Wait a few seconds for memory to cache out the last activation of the ODBC Driver. The message usually appears if you try to access a second data source soon after you finished using the same connection with a different source.

What is DDBUILDER?

DDBUILDER is the BASIS tool used to create the data dictionary. You can use the DDBUILDER or the OSAS functions on the Dictionary Tools menu to create the data dictionaries needed to work with ODBC.

Registration and Delivery G

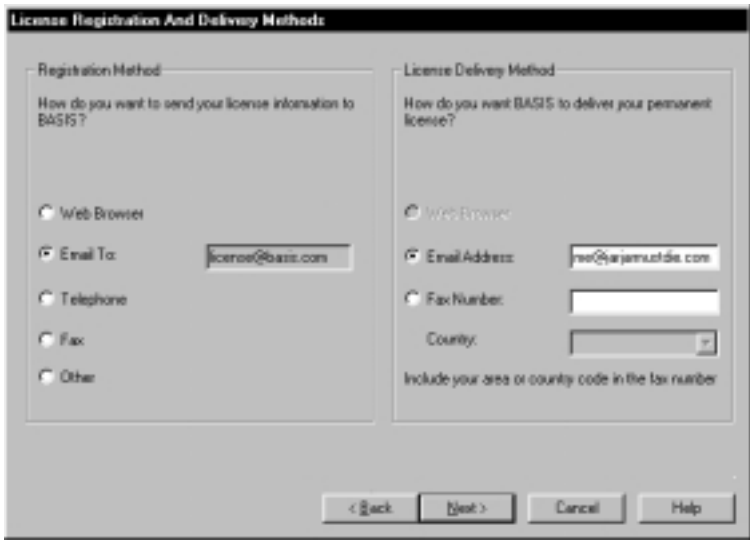
If your computer cannot be connected to the Internet, BASIS supplies you with other methods of receiving the license registration information. In step 15 of the installation process (see page 2-11), you are presented with several alternative choices. Follow the instructions below to register your license using one of these alternatives:

E-mail	page G-2
Telephone	page G-5
Fax	page G-11
Other	page G-18

E-mail

Note

To receive the license information via E-mail, you first need an E-mail account.



1. In the Registration Method box, click the **E-mail** button.

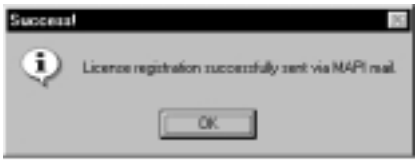
2. Click the **E-mail Address** button and enter the E-mail address at which you want to receive the license file information.

3. Click **Next**.

4. The License Information Confirmation screen appears. Confirm all the displayed information and, if it is correct, click **OK**. If there is an error, click **Cancel** and reenter the information.

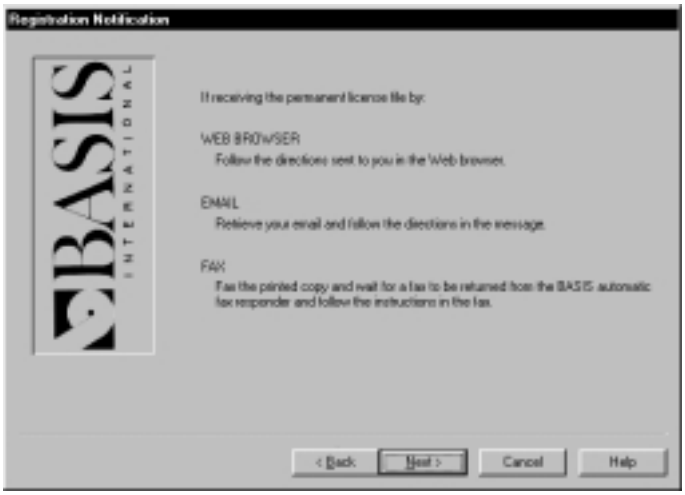
License Information Confirmation
Please verify that all information below is correct. If any of the following is incorrect, please click Cancel to make the necessary changes.
NOTE: Any incorrect information will result in a failure to process your license registration.
Fax Number:
Email Address:
Serial Number:
Authorization Number:
OK
Cancel

5. The Success box will appear when the E-mail has been sent to BASIS. Click **OK** to continue.



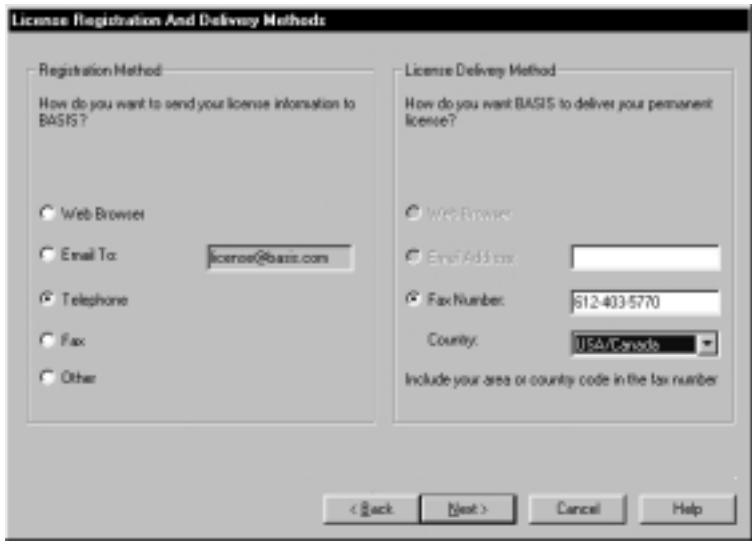
6. If you want to install another license, click **Yes**. The License and Registration box (see step one) appears. If not, click **No** and the Registration Notification screen (see step seven) appears.

7. Follow the instructions on the screen and click **Next**.


Registration Notification
BASIS
INTERNATIONAL
If receiving the permanent license file by:
WEB BROWSER
Follow the directions sent to you in the Web browser.
EMAIL
Retrieve your email and follow the directions in the message.
FAX
Fax the printed copy and wait for a fax to be returned from the BASIS automatic fax responder and follow the instructions in the fax.
< Back
Next >
Cancel
Help

8. If you have not installed the license, click **Yes**. The installation process will begin with the Install A BASIS License screen shown on page 2-13. If you do not want to install the license, click **No** and the Attention screen (below) appears and the installation process ends.

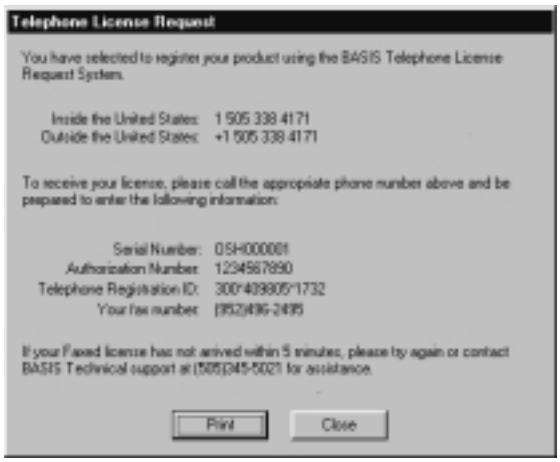
Telephone



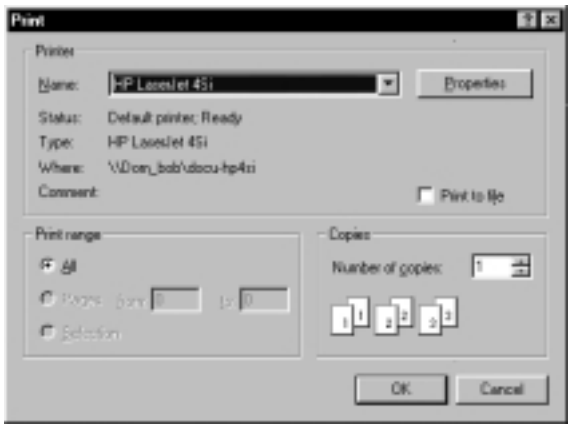
1. In the Registration Method box, click the **Telephone** button.

2. Click the **Fax Number** button and enter the fax number at which you want to receive the license file information. In the **Country** list box, select the appropriate country and click **Next**.

3. The Telephone License Request screen appears. Confirm all the displayed information and if it is correct, click **OK**. If the information is incorrect, click **Cancel** and reenter the information.


Telephone License Request
You have selected to register your product using the BASIS Telephone License Request System.
Inside the United States: 1 505 338 4171
Outside the United States: +1 505 338 4171
To receive your license, please call the appropriate phone number above and be prepared to enter the following information:
Serial Number: 05H000001
Authorization Number: 1234567890
Telephone Registration ID: 300*439805*1732
Your fax number: [952)496-2495
If your Faxed license has not arrived within 5 minutes, please try again or contact BASIS Technical support at (505)345-5021 for assistance.
Print
Close

4. The Print screen appears (below is an example). Click **OK** to print the information you need to give to BASIS for your license.



Shown is an example of the document that prints:

```
 TELEPHONE LICENSE REQUEST


Inside the United States:   1 505 338 4171
Outside the United States: +1 505 338 4171

To receive your license, please call the appropriate phone
number above and be prepared to enter the following information:

           Serial Number:  cmm0000001
     Authorization Number:  1234567890
Telephone Registration ID:  300*809805*1732
          Your Fax number:  (952)496-2495

If your Faxed license has not arrived within 5 minutes, please
try again or contact BASIS Technical Support at (505)345-5021
for assistance.  If there is a delay receiving your permanent
license, you may install the temporary license located at the
bottom of your "License Registration Form."
```

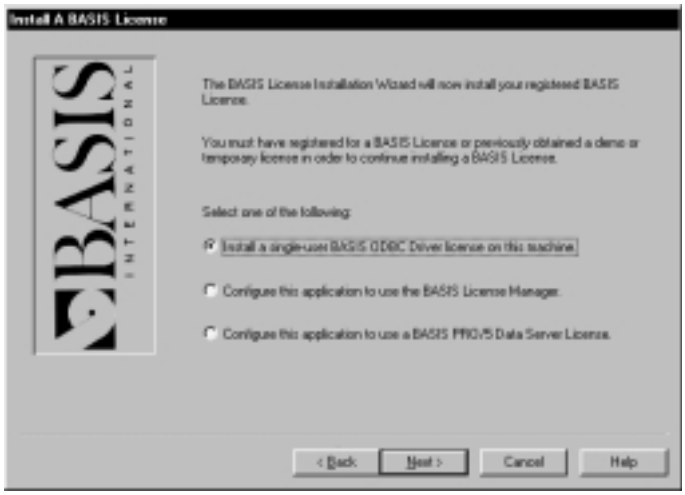
5. To complete the installation of your driver, call the phone number on the printout. Follow the instructions on the voice recording to specify the information on the printout, and follow the instructions to register your license.

   Once you receive the information, follow these instruction:

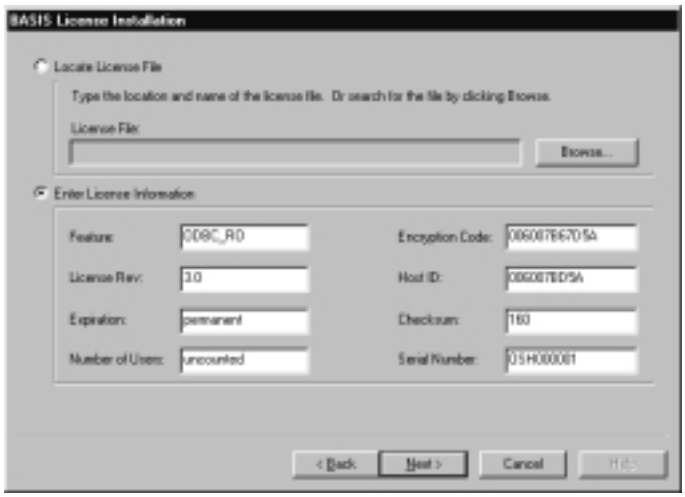
   1. On your Windows desktop, click **Start** and then click **Programs**.

   2. Click the **BASIS ODBC Driver 3.01** folder. Then click **Install a BASIS License**.

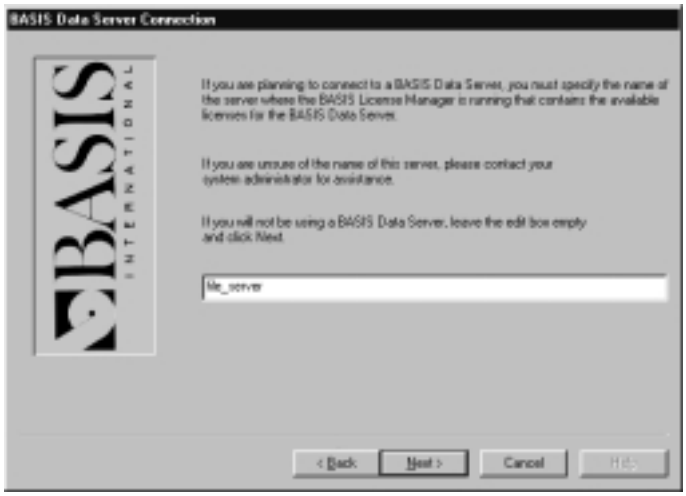
3. The Install A BASIS License screen appears. Click **Next**.


Install A BASIS License
BASIS
INTERNATIONAL
The BASIS License Installation Wizard will now install your registered BASIS License.
You must have registered for a BASIS License or previously obtained a demo or temporary license in order to continue installing a BASIS License.
Select one of the following:
Install a single-user BASIS ODBC Driver license on this machine.
Configure this application to use the BASIS License Manager.
Configure this application to use a BASIS PRO/5 Data Server License.
< Back
Next >
Cancel
Help

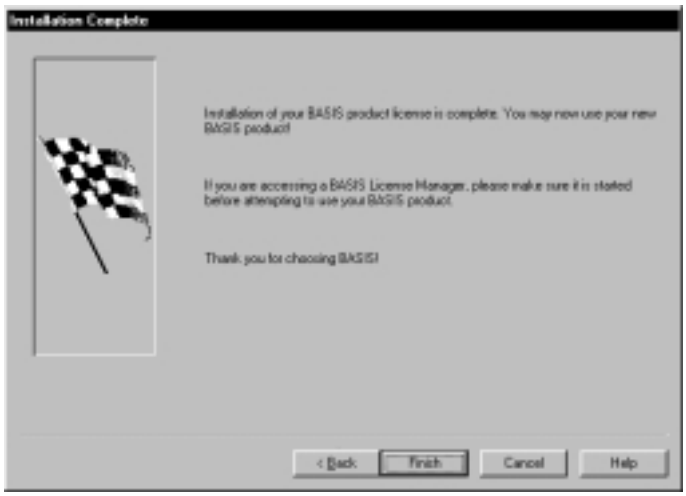
4. Click Enter License Information. Enter the information received from BASIS into the appropriate fields and click **Next**.



5. If you use OSAS^{CS} for Windows or UNIX/Linux, enter the name of the server that is running the Data Server. If you are using standard OSAS or OSAS^{CS} for Novell, leave the field blank. In either case, click **Next**.


BASIS Data Server Connection
BASIS
INTERNATIONAL
If you are planning to connect to a BASIS Data Server, you must specify the name of the server where the BASIS License Manager is running that contains the available licenses for the BASIS Data Server.
If you are unsure of the name of this server, please contact your system administrator for assistance.
If you will not be using a BASIS Data Server, leave the edit box empty and click Next.
< Back
Next >
Cancel

6. Click **Finish**.


Installation Complete
Installation of your BASIS product license is complete. You may now use your new BASIS product!
If you are accessing a BASIS License Manager, please make sure it is started before attempting to use your BASIS product.
Thank you for choosing BASIS!
< Back
Finish
Cancel
Help

7. If you do not want to view the readme.txt file, uncheck the box. Otherwise, click **Finish**.

Setup Complete
BASIS
INTERNATIONAL
Setup has finished. Some files could not be updated because they are currently in use by other programs on the system. These files will be updated after you reboot your system. It is strongly recommended that you read the accompanying readme.txt file.
View the readme.txt file
Use the check box to view the readme.txt file. After viewing the readme file, you will be prompted to reboot your system.
Thank you for choosing BASIS!
< Back
Finish

8. The Setup Complete screen appears. If you do not want to restart your computer, click the “No” radio button. If you do want to restart your computer now, first be certain that all other programs are closed. Then click Finish to activate your ODBC driver.

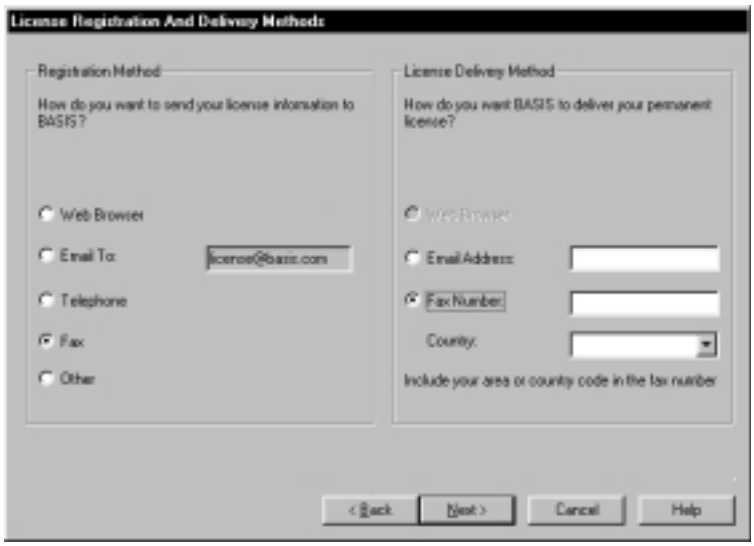
Setup Complete
BASIS
INTERNATIONAL
Setup has finished copying files to your computer.
Before you can use the program, you must restart Windows or your computer.
Yes, I want to restart my computer now.
No, I will restart my computer later.
Remove any disks from their drives, and then click Finish to complete setup.
< Back
Finish

9. Before you use the ODBC driver you must:

   - Install the ODBC Kit from your OSAS media
   - Create the config.tmp file (see page 3-3)

10. Once you have complete these two steps you can follow the following the ODBC Drives instructions on page 2-19.

Fax



1. In the Registration Methods box, click the **Fax** button

2. Click the **Fax Number** button and enter the fax number at which you want to receive the license file information. In the **Country** list box, select the appropriate country and click **Next**.

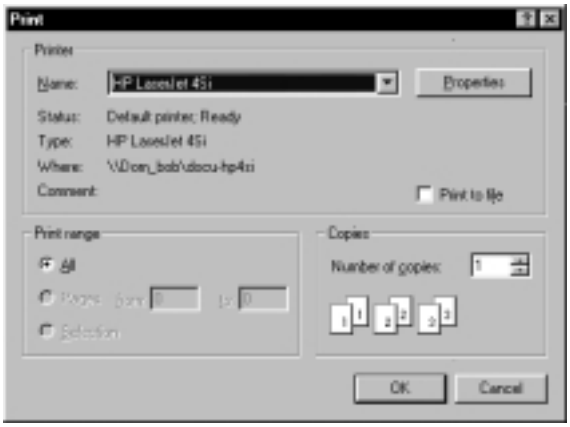
3. The License Information Confirmation screen appears. Confirm all the displayed information and if it is correct click **OK**. If the information is incorrect, click **Cancel** and reenter the information.

License Information Confirmation
Please verify that all information below is correct. If any of the following is incorrect, please click Cancel to make the necessary changes.
NOTE: Any incorrect information will result in a failure to process your license registration.
Fax Number:
Email Address:
Serial Number:
Authorization Number:
OK
Cancel

4. In the Emergency Contact Information screen, enter a contact name and phone number in case your fax cannot be sent. Click **OK**.

Emergency Contact Information
Please enter a name and phone number to expedite the delivery of a permanent license file in the unlikely event that problems are encountered during the license registration process.
Name:
Jacequeline Treichell
Phone:
512-403-5776
OK

5. The Print screen appears (below is an example). Click **OK** to print the information you need to fax to BASIS for your license.



Shown is an example of the document that prints:

```
##########################################
# Please fax this license form to BASIS
# International Ltd. at +1 505 338 4178
# to receive your permanent license file.
##########################################
Company:
Last Name:
First Name: Lisa Johnson
Phone Number: 952-403-5700
Fax Number: 952-496-2495
Email Address: lisa@builders_supply.com
Host Name: lisa
Host ID: 00E09805B732
Serial Number: OSH000001
License Auth Num: 1234567890
License Delivery: fax EN
Binary Fax Number:
001001000101000010000100001001000110
000010000100001001000101
Binary Host ID:
000000000000001110000000001001001000
000000000101001011000111000011000010
Binary Serial Number
011000011100010001000000000000000000
000000000000000001
Binary License Auth Num
000001000010000011000100000101000110
000111001000001001000000
```

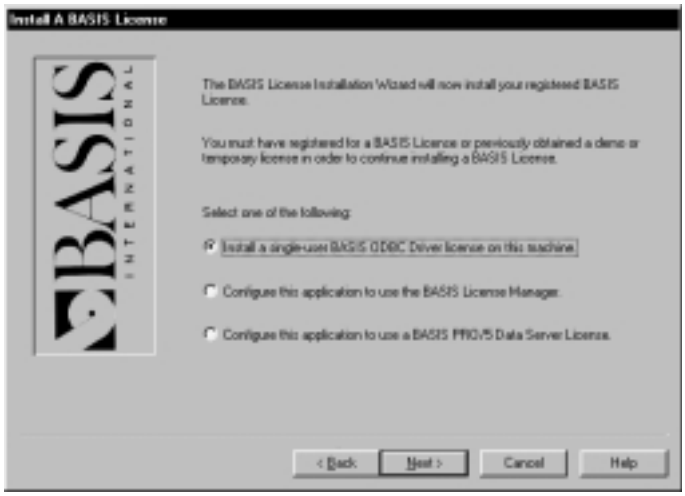
6. To complete the installation of your driver, call the phone number on the printout. Follow the instructions on the voice recording to specify the information on the printout and to register your license.

   Once you receive the information, follow these instruction:

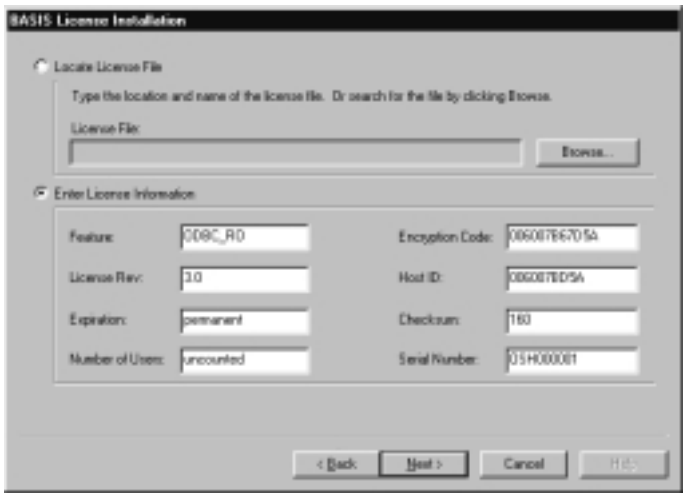
   1. On your Windows desktop, click **Start** and then **Programs**.

   2. Click the **BASIS ODBC Driver 3.01** folder and click **Install a BASIS License**.

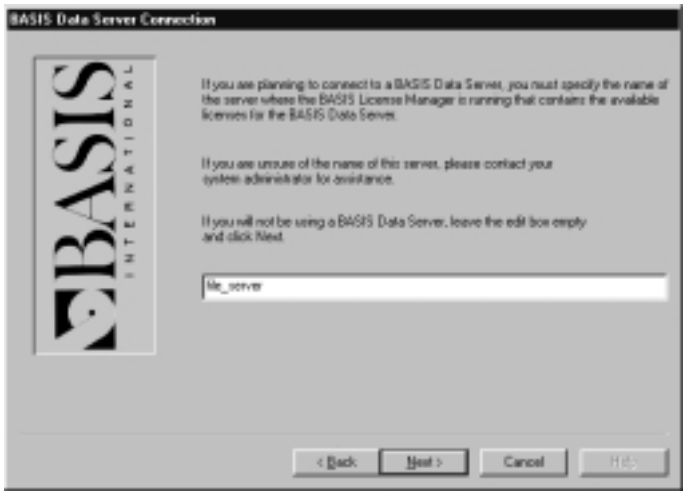
   3. The Install A BASIS License screen appears. Click **Next**.


Install A BASIS License
BASIS
INTERNATIONAL
The BASIS License Installation Wizard will now install your registered BASIS License.
You must have registered for a BASIS License or previously obtained a demo or temporary license in order to continue installing a BASIS License.
Select one of the following:
Install a single-user BASIS ODBC Driver license on this machine
Configure this application to use the BASIS License Manager
Configure this application to use a BASIS PRO/5 Data Server License
< Back
Next >
Cancel
Help

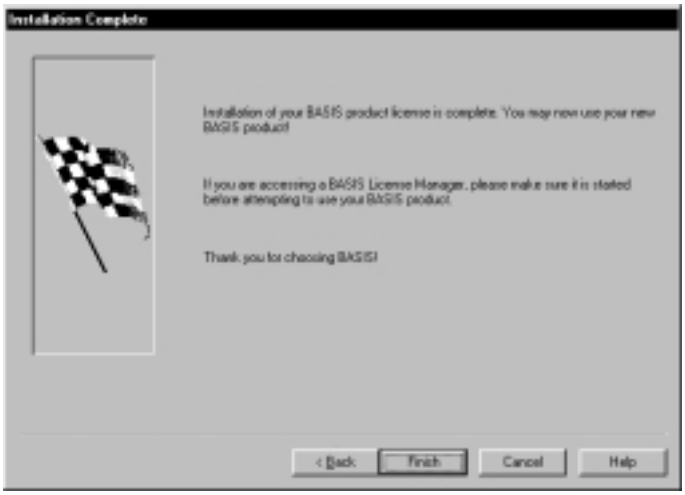
4. Click Enter License Information. Enter the information received from BASIS into the appropriate fields and click **Next**.



5. If you use OSAS^{CS} for Windows or UNIX/Linux, enter the name of the server that is running the Data Server. If you are using standard OSAS or OSAS^{CS} for Novell, leave the field blank. In either case, click **Next**.


BASIS Data Server Connection
BASIS INTERNATIONAL
If you are planning to connect to a BASIS Data Server, you must specify the name of the server where the BASIS License Manager is running that contains the available licenses for the BASIS Data Server.
If you are unsure of the name of this server, please contact your system administrator for assistance.
If you will not be using a BASIS Data Server, leave the edit box empty and click Next.
< Back
Next >
Cancel

6. Click **Finish**.


Installation Complete
Installation of your BASIS product license is complete. You may now use your new BASIS product.
If you are accessing a BASIS License Manager, please make sure it is started before attempting to use your BASIS product.
Thank you for choosing BASIS!
< Back
Finish
Cancel
Help

7. If you do not want to view the readme.txt file uncheck the box. Otherwise, click **Finish**.,

Setup Complete
Setup has finished. Some files could not be updated because they are currently in use by other programs on the system. These files will be updated after you reboot your system. It is strongly recommended that you read the accompanying readme.txt file.
View the readme.txt file
Use the check box to view the readme.txt file. After viewing the readme file, you will be prompted to reboot your system.
Thank you for choosing BASIS!
BASIS
INTERNATIONAL
< Back
Finish

8. The Setup Complete screen appears. If you do not want to restart your computer, click the “No” radio button. If you do want to restart your computer now, first be certain that all other programs are closed. Click Finish to activate your ODBC driver.

Setup Complete
BASIS
INTERNATIONAL
Setup has finished copying files to your computer.
Before you can use the program, you must restart Windows or your computer.
Yes, I want to restart my computer now.
No, I will restart my computer later.
Remove any disks from their drives, and then click Finish to complete setup.
< Back
Finish

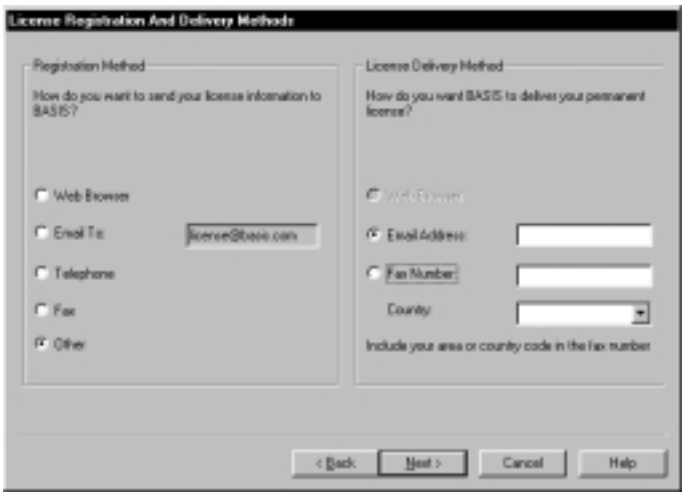
9. Before you use the ODBC driver you must:

   - Install the ODBC Kit from your OSAS media
   - Create the config.tmp file (see page 3-3)

10. Once you have completed these two steps, you can follow the Installing ODBC Drivers instructions on page 2-19.

Other

The Other option is useful for installing your license if the computer on which you installing does not have E-mail or Internet access.



1. In the Registration Method box, click the **Other** button

2. Click either the E-mail or **Fax Number** button (depending on how you want to receive the license) and enter the E-mail address or fax number at which you want to receive the license file information. If you entered a fax number, select the appropriate country in the **Country** list box. Click **Next** to continue.

3. Read the WARNING! screen's instructions carefully. Click **OK** to proceed.

WARNING!
You have selected "Other" as your Registration Method.
ONLY USE THIS METHOD WHEN:
* you DO NOT have access to the Internet, email, or a printer on this machine
* or you have been UNABLE to successfully register via the Web, email or fax.
Proceeding with this option prompts you to save your License Registration information as a file. Once saved, move the file to a machine with email or printer access and
* Email the file to license@basis.com for an immediate reply,
* or print this file and fax it to BASIS for a reply during BASIS' operating hours of Monday through Friday, 8:00 a.m. - 5:00 p.m. Mountain time (-0700 GMT).
The permanent license will be returned by email or fax, whichever you selected as the License Delivery Method.
Click OK to proceed
OR
Click Cancel to select another Registration Method.
OK
Cancel

4. The License Information Confirmation screen appears. Confirm all the displayed information and, if it is correct, click **OK**. If it is not correct, click **Cancel** and reenter the information.

License Information Confirmation
Please verify that all information below is correct. If any of the following is incorrect, please click Cancel to make the necessary changes.
NOTE: Any incorrect information will result in a failure to process your license registration.
Fax Number:
Email Address:
Serial Number:
Authorization Number:
1234567890
OK
Cancel

5. The Save As screen appears. Save the license file onto a diskette (or on a network drive). Click **Save**.

6. Take the diskette (or access the saved file from the network drive) to a computer with E-mail access.

7. Send the file to BASIS via E-mail.

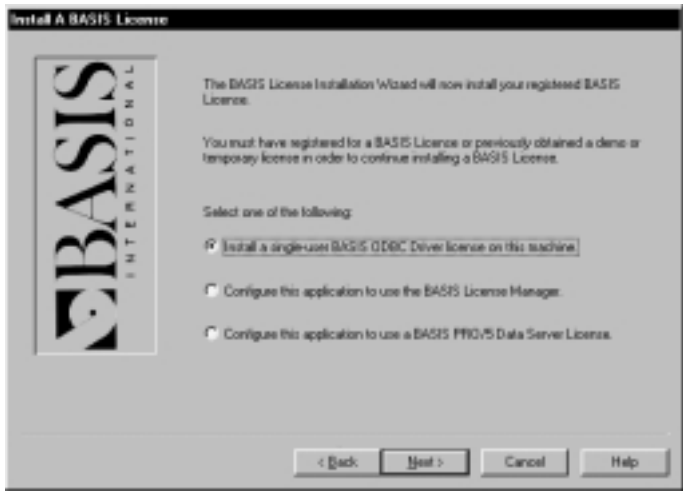
8. An E-mail message or fax is sent to you from BASIS. Follow the instructions to register the license information on the original computer.

   Once you receive the information, follow these instruction:

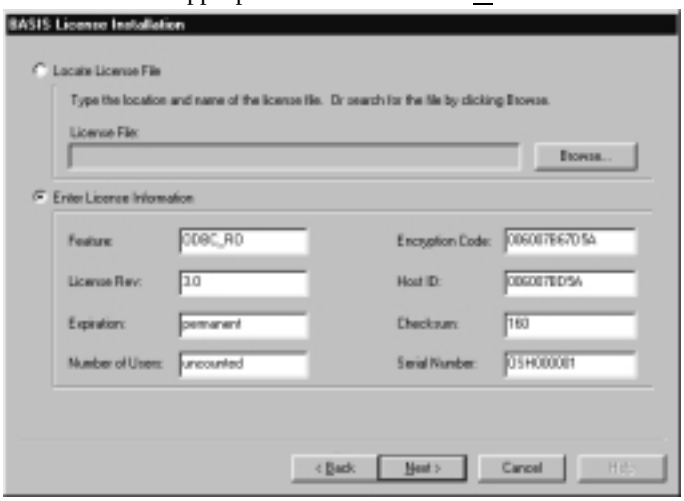
   1. On your Windows desktop, click **Start** and then **Programs**.

   2. Click the **BASIS ODBC Driver 3.01** folder and click **Install a BASIS License**.

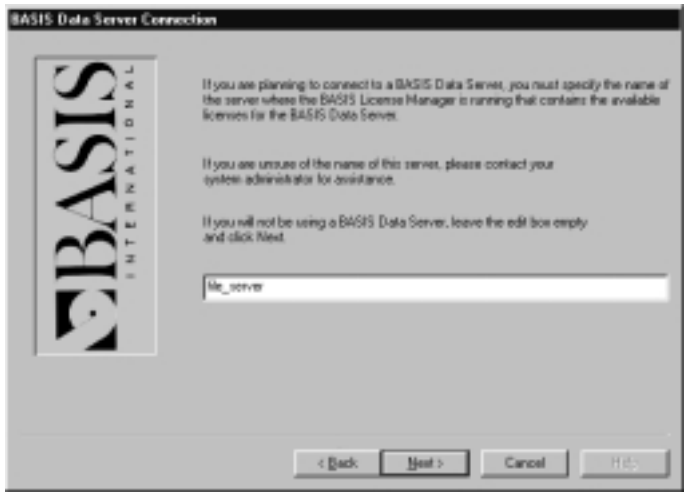
3. The Install A BASIS License screen appears. Click **Next**.


Install A BASIS License
BASIS INTERNATIONAL
The BASIS License Installation Wizard will now install your registered BASIS License.
You must have registered for a BASIS License or previously obtained a demo or temporary license in order to continue installing a BASIS License.
Select one of the following:
Install a single-user BASIS ODBC Driver license on this machine.
Configure this application to use the BASIS License Manager.
Configure this application to use a BASIS PRO/5 Data Server License.
< Back
Next >
Cancel
Help

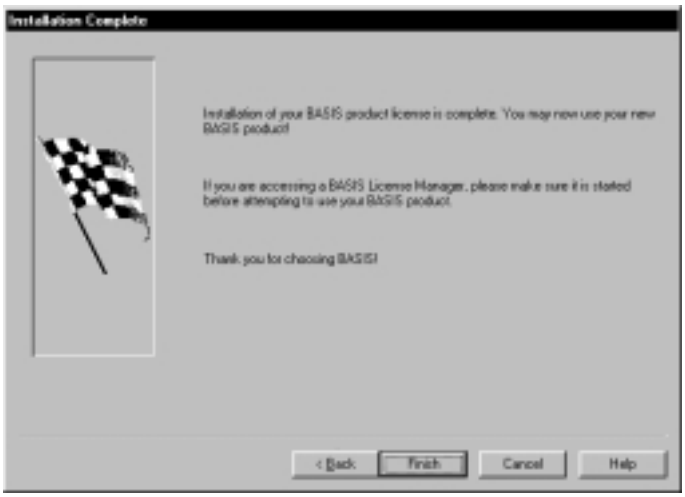
4. Click **Enter License Information**. Enter the information received from BASIS into the appropriate fields and click **Next**.



5. If you use OSAS^{CS} for Windows or UNIX/Linux, enter the name of the server that is running the Data Server. If you are using standard OSAS or OSAS^{CS} for Novell, leave the field blank. In either case, click **Next**.


BASIS Data Server Connection
BASIS
INTERNATIONAL
If you are planning to connect to a BASIS Data Server, you must specify the name of the server where the BASIS License Manager is running that contains the available licenses for the BASIS Data Server.
If you are unsure of the name of this server, please contact your system administrator for assistance.
If you will not be using a BASIS Data Server, leave the edit box empty and click Next.
< Back
Next >
Cancel
Help

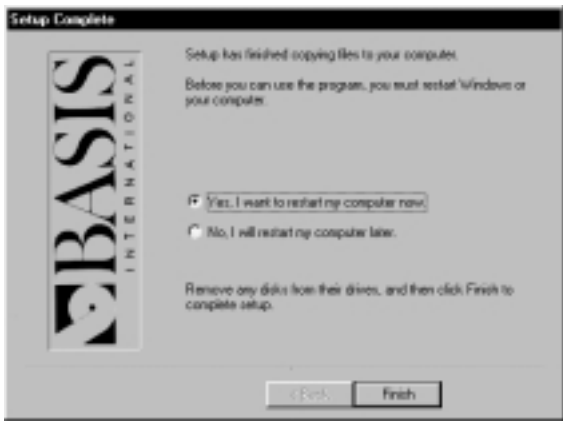
6. Click **Finish**.


Installation Complete
Installation of your BASIS product license is complete. You may now use your new BASIS product!
If you are accessing a BASIS License Manager, please make sure it is started before attempting to use your BASIS product.
Thank you for choosing BASIS!
< Back
Finish
Cancel
Help

7. If you do not want to view the readme.txt file uncheck the box. Otherwise, click **Finish**.

Setup Complete
Setup has finished. Some files could not be updated because they are currently in use by other programs on the system. These files will be updated after you reboot your system. It is strongly recommended that you read the accompanying readme.txt file.
View the readme.txt file
Use the check box to view the readme.txt file. After viewing the readme file, you will be prompted to reboot your system.
Thank you for choosing BASIS!
< Back
Finish

8. The Setup Complete screen appears. If you do not want to restart your computer, click the “No” radio button. If you do want to restart your computer now, first be certain that all other programs are closed. Click Finish to activate your ODBC driver.


Setup Complete
Setup has finished copying files to your computer.
Before you can use the program, you must restart Windows or your computer.
Yes, I want to restart my computer now.
No, I will restart my computer later.
Remove any disks from their drives, and then click Finish to complete setup.
< Back
Finish

9. Before you use the ODBC driver you must:

   - Install the ODBC Kit from your OSAS media
   - Create the config.tmp file (see page 3-3)

10. Once you have completed these two steps you can follow the following Installing ODBC Drivers instructions on page 2-19.

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